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ABSTRACT

Designed to assist business education teachers of secondary students and adults in updating the business education curriculum in Arizona, this curriculum guide is intended to provide a transition from present courses to programs structured around competency-based instruction. The level of competency needed for specific career clusters and modules of instruction is identified in the guide. It includes revised editions of the typing, shorthand, accounting, data/information processing, word/information processing, record keeping, and applying for a job modules of instruction of the Arizona Business and Office Occupations Curriculum Guide. Each module contains competency goals (task with performance standard), learning activities and teaching suggestions, and criterion-referenced tests, plus a student profile sheet for recording goal completion, and a certificate of competency. New supplementary sections for the teacher on Future Business Leaders of America/Phi Beta Lambda, and on energy conservation are also included along with information on criterion-referenced instruments and on grading. (KC)

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Competency Based Curriculum

Arizona Department of Education

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During the past decade, the business office has undergone tremendous change which has resulted in a need to continuously revise and upgrade educational programs designed to prepare office employees. Competency-based education is not a new approach to vocational education; it identifies the competencies, informs students and teachers of the tasks comprising the competency, and gives the minimum standard necessary to pass the competency. Competencies are based on tasks performed on the job--they reflect the knowledge, skills, concepts, and attitudes that are necessary for the successful entry and advancement in the world of work. The level of competency needed for specific career clusters and modules of instruction is identified at the front of the guide.

This publication for use in secondary schools of Arizona can serve as a foundation for a program that produces employable students. The business teacher can contribute by planning, organizing, and selecting the materials and activities necessary to help the student achieve these employment competencies. Selected teachers composed of a cross-section from secondary and post-secondary schools throughout Arizona comprised the Curriculum Guide Committee that revised this guide. The Committee included the components of competency-based programs: competency goals, levels of performance, learning activities, teaching suggestions, criterion-referenced instruments, competency profiles, and certificates of proficiency.

It is planned that the suggested guide will assist business education teachers of secondary students and adults in updating the business education curriculum in Arizona. The purpose is to provide students with entry-level job competencies compatible with the needs of employers. The system is designed so there can easily be a transition from courses to programs structured around competency-based instruction.

Toby D. Jalowsky
State Supervisor
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PREFACE

This book includes revisions for the Typing, Shorthand, Accounting, Data/Information Processing, Word/Information Processing, Record Keeping, and Applying For a Job sections of the Arizona Business and Office Occupations Curriculum Guide. There are new sections on FBLA/PBL and Energy Conservation.

To meet the needs of students in the State of Arizona, the materials were redesigned for competency-based instruction. Competency based instruction requires clearly identified competencies that are the minimum accepted standards required in a a job situation that are acceptable by business employers. The revisions also include expanded learning activities and teaching suggestions that help lead to the accomplishment of these competencies and better prepare students to enter the labor market upon graduation and be successfully employed.

This revision maintained the four levels of competency begun in the earlier edition. Level I is identified as introduction or basic skill development. There are some entry-level jobs at this level. Level II is reinforcement or expansion of basic skills; Level III is a refinement or application of skills; and Level IV is specialization or high proficiency.

Competency-based instruction is based on a task analysis of duties performed for a given job. National surveys and research including NOBELS (New Office and Business Education Learning Systems) were utilized by the Curriculum Committee in arriving at the tasks in which students must be competent at a specified level. Additionally, surveys were made of Arizona employers and Business Advisory Committee members to correctly identify the level of competency required at the state level. Actual work experience was another source used to help identify the minimum standards that must be achieved.

A careful review of the following pages will aid greatly in understanding and using this guide.

HOW TO USE THIS GUIDE

OVERVIEW AND OUTLINE - Each section has a brief overview of the material contained in each level of competency. This gives the reader a quick survey of the content. More useful, perhaps, is the detailed outline immediately following the competency goal statements which lists the recommended material for the level. The outline is not intended to be comprehensive, but rather a source of help to the teacher as to the content which should be covered.

LEVELS OF COMPETENCY - The levels of competency are consistent with the levels used in the original guide: Level I is Introduction or Basic Skill Development; Level II is Reinforcement or Expansion: Level III is Refinement or Application; and Level IV is Specialization or High Proficiency.

COMPETENCY GOALS - Each competency goal has three parts: the task, the performance by the student, and the minimum standards to be achieved. The goals are considered essential for the student to be competent at the level indicated. There may be many other competencies that are "nice to know" at the level; but they are not essential. These competencies or activities are given in the Learning Activities and Teaching Suggestions pages. It is emphasized that competency goals are based on tasks that have been identified.

CODE - A simple code is used for the first time in this book. The competency goals at each level are given a number. T-I-1 for example stands for Typing, Level I, Goal 1. This same code number is used with the learning activities and teaching suggestions so the teacher can immediately identify which goal the activities and suggestions relate to. When criterion instruments are given for goals, they also are identified with the goal code number. On the competency profile chart, the code number assists in identifying the competencies the student has completed at each level.

LEARNING ACTIVITIES AND TEACHING SUGGESTIONS - Since this revised book is to serve as a guide, it was not physically possible to enumerate learning activities for an entire program. Therefore, in the Learning Activities and Teaching Suggestions pages, the authors have given those activities and suggestions which they felt would be helpful in assisting students to meet the competency level. It was not intended to be all inclusive.

CRITERION-REFERENCED INSTRUMENTS - To measure competency goals, it is recommended that criterion-referenced tests or criterion-referenced measures (checklists) be utilized. These tests measure exactly what has been stated in the competency goal statement as to the task, performance, and standard. All standards given in this guide are minimum employable standards. It is expected that students will achieve at higher levels. There is an informative section in these introductory pages on criterion-referenced instruments and grading suggestions for competency-based programs. The same criterion-referenced instruments could be used for a pre-test or post-test as well as a production test by merely changing the test items or situation.

COMPETENCY PROFILE - To assist the teacher in record keeping and the management of competencies which each student has mastered at each level, a Competency Profile has been included. The profile includes such information as the student's name, starting date, completion date, and the date the Certificate of Competency was awarded. Each competency is identified by the competency goal code number as well as a word label. There are columns of items for the teacher to check such as qualified, not qualified, date, and initials. Levels with many competency goals are listed on a separate competency profile; levels with few goals are listed on the same profile.

COMPETENCY CERTIFICATE - Each revised section in the curriculum guide now has a Competency Certificate which the teacher is urged to have reproduced to award to students who have mastered a competency level. Since appropriate levels are given on the back of the certificate, it is recommended that the teacher have higher levels blocked off before reproducing. For example, Level I certificate would have only the Level I competencies printed on the back; Level II would have only the Level II competencies printed on the back, etc. This certificate is not only an award; it also provides written evidence of the competencies achieved. It is a tangible document to show employers, parents, and other community persons what the student has accomplished.

PAGE NUMBERS - A new numbering code is used for the revised sections. Each section is numbered consecutively, but has an identifying letter(s) preceding it. These are to enable the teacher to rapidly identify the pages being sought. T-12, for example, is the page number for the Typing Section, page 12; RK, Record Keeping; A, Accounting; S, Shorthand; and E for the Energy Conservation section. W/IP represents the unit on Word/Information Processing and D/IP stands for Data/Information Processing. Technologies in these two fields are merging. There is increasing integration of supervision, equipment, procedures and personnel. These labels were designed to indicate this eventual merging of the areas which will undoubtedly be known as Information Processing.

NEW UNITS - There are two new sections in this revised curriculum guide.

FUTURE BUSINESS LEADERS OF AMERICA/PHI BETA LAMBDA (FBLA/PBL) - Although there is a national FBLA/PBL Handbook and a Guide to Integrate FBLA Into The Curriculum, more information is needed at an earlier date to be most helpful to student organization advisors. This is especially true for new chapters. It is hoped that the section on FBLA/PBL which contains a concise summary of what is available to the teacher, suggestions for activities, recruitment, planning a program, and the role of the advisor, will assist in creating a successful local chapter.

CONSERVATION OF MATERIALS AND ENERGY - To assist teachers in preparing students to be consumers and workers who are aware of and concerned for conservation of materials and energy both in the classroom and in the business world, a section has been included in this curriculum guide with background information, ways to conserve energy and materials, and teaching suggestions. Individual sections in the guide also have suggestions which are identified with a ✹ (sun) symbol.

CRITERION-REFERENCED INSTRUMENTS AND GRADING

CRITERION-REFERENCED INSTRUMENTS

Criterion-referenced instruments, which are an integral part of this revised guide, are used to measure whether the student has mastered the competency goal including the task, the performance, and the standard. The standards given in this guide are the minimum standards that students are expected to achieve for entry-level employment. It should be remembered that the accepted standard of 80 percent accuracy is considered minimum when deciding on standards of performance in an office.

Criterion-referenced instruments measure the student's achievement against predetermined on-the-job standards rather than comparing the student with other classmates. Two types of instruments are usually used: criterion tests and criterion measures. Criterion-referenced tests are written tests; they are used to measure the knowledge mastered. Criterion-referenced measures are checklists that itemize demonstrated competencies.

GRADING

A basic premise in competency-based education is that given sufficient time and appropriate material most students can achieve successive competencies. Theoretically, a student who successfully completes a competency would receive a passing (P) grade or if unsuccessful would receive a failing (F) grade. However, since most educational school systems require a letter or numerical grade as a basis of achievement, it is necessary for the teacher using a competency-based system to convert what is essentially a pass or fail situation into letter grades. Some of the possibilities that might be useful to teachers are described below.

A. Quantity. A student who masters more competencies in a given grading period would receive a higher grade than a student who masters fewer competencies. Slower students are penalized when this method is used.

B. Points. Each activity related to a competency goal can be assigned points which are totaled and a grade scale run. Points could be assigned for post test, checklists, learning activities, drill pages, notebooks, special reports, daily quizzes, or whatever the teacher desires to use for the unit of instruction.

C. Weighted Measurements. When certain activities of a competency measurement are of greater importance than other activities in the measurement, the teacher could assign a higher weight to the more important activities. For example, in shorthand a measurement for typing letters in mailable form would be worth more than an objective test in punctuation.

D. Exceeding Competency Minimums. Students who meet competency minimums would be considered passing (grade of C). Students who score higher than the minimum would receive a higher grade accordingly. For example, in typing at Level I, the minimum speed is 25 gwam (grade of C); a student who consistently types at 35 gwam would receive a grade of A.

CRITERION-REFERENCED INSTRUMENTS AND GRADING
(Continued)

E. Weighted Competencies. In some instructional units where materials are self-paced, points can be assigned to competencies according to the amount of assistance given to pass the competency. For example, a student who consistently exceeds the standard when performing the task could receive 10 points; a student who meets the standard when performing the task would receive 8 points; a student who requires some assistance when performing the task would receive 6 points; and the student who requires constant assistance when performing the task would receive 4 points.

F. Performance Contracts. The student and teacher agree at the beginning of a unit the amount of work which must be done for a specified grade level. Each higher grade requires correspondingly more work, with the grade of C meeting the minimum competency. A written contrct is signed by both the teacher and the student enumerating all aspects of the contract including time, standards, and activities.

ACCOUNTING CAREER CLUSTER

Accounting is one of the fastest-growing fields in the country. It is often described as "the language of business." Many changes have taken place in the methods used by businesses to process financial data. Electronic data processing has decreased the amount of routine manual recording such as journalizing and posting, but it has not decreased the need for understanding basic accounting principles.

With the increased use of automated equipment, a change in the accounting classroom is becoming apparent. Emphasis is placed on understanding accounting principles and concepts rather than on performing repetitive, manual work. The business student needs the accounting background for a wide range of accounting, computing, clerical, and data processing jobs.

Students who have demonstrated competency in training in the accounting cluster may be prepared for such jobs as:

ENTRY LEVEL JOBS	LEADING TO
Bookkeeper	Accountant
Cashier	Certified Public Accountant
Clerk	Public Accountant
Accounts Receivable	
Payroll	
Accounts Payable	
General Ledger	
Credit	
Teller	

CLERICAL CLUSTER

Preparing students for jobs within the clerical cluster will provide male and female students with marketable skills for adaptation to the specific tasks of the automated office now and in the future. The demand for clerical office personnel is continuing to increase at a phenomenal rate—typists by approximately 35 percent, billing clerks by 56 percent, mail handlers by 35 percent, and receptionists by 38 percent.

The instruction for entry-level employment should consist of an integration of selected office education activities designed to give the student technical skills, human relations skills, business knowledge, and professional attitudes. Though shorthand is not required in this sequence, some abbreviated system for taking instructions, telephone messages, and other items may be extremely helpful.

There is a wide range of skills which may be required of a clerical worker. Among these skills might be: typing, filing, record keeping, reprographics, telephone techniques, operating office machines, mail handling, office procedures, basic mathematics, word processing, and some data processing skills. Good communication skills would be considered a must for every office worker.

As today's office becomes more and more complex, specialized skills are becoming commonplace for the clerical office worker. Many of the jobs requiring more technical skills will overlap with those in the secretarial cluster in this curriculum guide.

CLERICAL CLUSTER (Continued)

Students who have demonstrated competency in skills in the clerical cluster may be prepared for such jobs as:

ENTRY-LEVEL JOBS	LEADING TO
Cashier	Administrative
Clerk Typist	Credit Supervisor
Correspondence Clerk	Office Manager
File Clerk	Phototypesetting Specialist
Hospital Admitting Clerk	Proofreader/Editor
Mail Clerk	Records Supervisor
Receptionist	Shipping/Receiving Supervisor
Statistical Typist	Word Processing Operator
Teller	Word Processing Supervisor
Transcribing Machine Operator	

DATA PROCESSING/COMPUTER CAREER CLUSTER

Data/information processing is not new in the office world. However, because of advanced technology the methods are changing rapidly. Not all workers in this area will be programmers, but many workers in the office will be working with the input and output from computers; and many will come in direct contact with input and output devices. Over 475,000 computer specialists will be needed in 1985--an increase of 55 percent over those employed in 1974. Even though lower-level jobs such as keypunch operator will be decreasing, the entry-level basics are still a necessity.

With the changing technology it appears that almost everyone may need to have computer literacy, and all business students need some introduction to computers. Many schools now have access to a computer through time-sharing. With the low cost of microcomputers, it should soon be possible for any classroom to have some type of computer equipment. The microcomputer can also serve a dual purpose as word processing equipment.

Data processing/computer skills may include learning to handle input/output media and hardware, to operate equipment for processing business data, programming techniques, and foundation skills for further education in computer science and management information systems.

Students who have demonstrated competency in training in the data processing/computer cluster may be prepared for such jobs as:

ENTRY-LEVEL JOBS	LEADING TO
Data Control Clerk	Data Entry Supervisor
Data Entry Operator	Data Processing Manager
Data Processing Librarian	Programmer
Programmer Trainee	Systems Analyst
Terminal Operator	Systems Programmer

SECRETARIAL CAREER CLUSTER

Training in the secretarial career cluster will prepare the student with entry-level jobs in varied fields. A job in this cluster may require many skills and knowledges, but the basis for most secretarial jobs is typing and communication skills. Although many jobs in this area may not require shorthand, the student's employment potential may be enhanced with marketable skills in shorthand and transcription.

Secretarial jobs are as varied as the secretaries themselves—no two are exactly alike. A secretary in a small office, for example, might handle a variety of tasks such as letter writing, typing, filing, and billing. In a larger office the secretary may be responsible for fewer tasks in a more specialized area.

Six million secretaries will be needed by 1985, an increase of 50 percent over those employed in 1974. One emerging career path is in the field of word/information processing.

Students who have demonstrated competency in training in the secretarial cluster may be prepared for such jobs as:

ENTRY-LEVEL JOBS	LEADING TO
Correspondence Clerk	Administrative Assistant
Machine Transcriptionist	Executive Assistant
Stenographer	Office Manager
Word Processing Operator	Supervisor, Steno Pool
Word Processing Trainee	Word Processing Coordinator

LEVELS OF COMPETENCY FOR CAREER CLUSTERS

The following chart indicates suggested levels of competency for each career cluster (new or revised) in this guide:

Level	I	Introduction or Basic Skill
Level	II	Reinforcement or Expansion
Level	III	Refinement or Application
Level	IV	Specialization or High Proficiency

	ACCOUNTING	CLERICAL	DATA PROCESSING/COMPUTER	SECRETARIAL	PERSONAL BUSINESS SKILLS
ACCOUNTING	IV	I	II		
APPLYING FOR A JOB	III	III	III	III	III
DATA/INFORMATION PROCESSING	II	II	III	II	I
RECORD KEEPING		III		III	IV
SHORTHAND				IV	I
TYPING	I	IV	I	IV	I
WORD/INFORMATION PROCESSING		IV		III	
ENERGY CONSERVATION	X	X	X	X	X
FBLA/PBL	X	X	X	X	X

All other sections in the previous curriculum guide will be revised in 1981.

ACCOUNTING

Accounting differs from the traditional bookkeeping course in that it gives an overall view of the total process--capturing, recording, reporting, and using financial data. It presents recording as a function and seeks to give an understanding of various ways that data may be recorded. Increasingly, businesses are utilizing mechanical and electronic equipment in their accounting systems. As a result, many of the duties involved in accounting work have changed.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Accounting I and Accounting II.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Starting an Accounting System Accounting Cycle Journalizing Posting Trial Balance Worksheet Financial Reports Closing the Ledger Post-Closing Trial Balance	Journalizing Transactions of a Merchandising Business Posting Transactions of a Merchandising Business Banking End-of-Fiscal Period Reports Automation	Payroll Petty Cash Income Tax Uncollectible Accounts Plant Assets and Depreciation Promissory Notes	Partnerships Voucher System Uncollectible Accounts Plant Assets and Depreciation Inventory Valuation Accruals and Deferrals Corporations Cost Accounting Information for Management Decisions

ACCOUNTING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
A-I-1	Given an objective test covering terms and theory of debits and credits	the student will complete the test	with 80 percent accuracy.
A-I-2	Given correct working papers and a problem covering journalizing, posting, balancing accounts, and a trial balance	the student will solve the problem	with 100 percent accuracy.
A-I-3	Given correct working papers and a worksheet containing a trial balance	the student will complete the worksheet and prepare an income statement and balance sheet, record and post the closing entries and prepare a post-closing trial balance	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-I-1	Starting an Accounting System Introduction to terminology Accounting equation Theory of Debit and Credit Accounts	A-I-1	Arrange a walking tour through the school offices, observing what records must be kept for each student. From the newspaper, find classified advertisements requiring accounting skills. Discuss careers such as bookkeeper, accountant, public accountant, payroll clerk, tax accountant, certified public accountant, et al. As time permits, use prepared case studies to stimulate interest. Prepare a display of business papers from the community. Include computer input and output. Name four different businesses or professions (local if possible) and name the major source of revenue for each. Given a list of assets and liabilities, compute the owner's equity and prepare a balance sheet. Record opening entries for various kinds of small service businesses. Record and post opening entries for various kinds of small service businesses.
A-I-2	The Accounting Cycle Journalizing Cash proof	A-I-2	Use flash cards. Place one transaction only on each flash card. Use large-size posters and print the transaction large enough to be easily read by the entire class. Place the transaction on one side of the flash card and the answer on the other side. This can also be done with the overhead projector.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-I-2	Relationships among assets, liabilities, and capital Changes in assets, liabilities, and capital Income Expenses Posting Account balance Trial balance Worksheet	A-I-2	When the students have completed journalizing simple transactions, games such as Monopoly may be used. Use the regular Monopoly (or other game) rules and have one board for each four players. Players will journalize the transactions as their turn occurs while the other players observe. At the end of the allotted time, if the player has correctly journalized the transaction, the game continues; otherwise the player loses that turn. (The transactions could be recorded on computer if equipment is available).
A-I-3	Financial reports Income statement Balance sheet Closing the Ledger Post-closing trial balance	A-I-3	Relate financial statements and records to personal use such as being necessary to obtain loans, preparing income taxes, etc. Have students prepare flow charts of the accounting cycle. If a microcomputer and software are available, at the conclusion of the accounting cycle for a service business, have the student repeat on the computer the same project(s) that have been done manually. To provide for individualization, teacher may want to present chapter to group but provide assignment sheets listing all assigned activities so that students may work at their own speed.

ACCOUNTING CRITERION-REFERENCED TEST

LEVEL I

A-I-1 BEGINNING ACCOUNTING THEORY TEST

Section 1 - Classify the following accounts by placing an "A" before the assets, "L" before Liabilities and "E" before the equity accounts:

Sample Items: (Use as many items as necessary to test competency.)

______ Cash
______ ABC Company (creditor)
______ Jerry Cole, Capital

Section 2 - Match the terms in the first column with the definition in the second column.

Sample Terms: (Teacher supply definitions for terms listed.)

______ Asset
______ Equity
______ Balance Sheet

Section 3 - Analyze each transaction below. Record the account title and the debit and credit amount in the appropriate "T" accounts.

Sample Transactions:

1. Matt Link started business with $400 in cash.
2. Bought additional equipment for $500 cash.
3. Paid $300 to Harris, Inc. (a creditor).

1. (DR)

1. (CR)

A-I-2 JOURNALIZING, POSTING, AND TRIAL BALANCE TEST

Give students a ledger containing beginning balances. From a list of transactions, the student will journalize, post, and prepare a trial balance.

A-I-3 END-OF-CYCLE TEST

Give student a worksheet containing a trial balance. The student will complete the worksheet, prepare an income statement, a balance sheet, record and post the closing entries, balance the accounts, and prepare a post-closing trial balance.

ACCOUNTING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
A-II-1	Given the correct working papers and a list of merchandising transactions	the student will record the transactions	with 100 percent accuracy.
A-II-2	Given the correct working papers and a completed set of journals containing ten pre-recorded transactions	the student will post the transactions from the journals to the proper ledgers and prepare a schedule of accounts payable and a schedule of accounts receivable	with 100 percent accuracy.
A-II-3	Given a check register, checks, a prepared bank statement, and a list of banking transactions	the student will prepare the check register, checks, and a bank reconciliation	with 100 percent accuracy.
A-II-4	Given a worksheet containing a completed trial balance and the necessary adjustments for a merchandising business	the student will complete the worksheet, prepare the income statement, and balance sheet, record and post adjusting and closing entries and take a post-closing trial balance	with 100 percent accuracy.

ACCOUNTING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Transactions of a Merchandising Business		Contact local accounting organizations for materials, resources, or programs which might be available. Identify how a merchandising business differs from a service business and define terms relating to a merchandising business.
A-II-1	Journalizing Special Business forms and source documents General Sales and Purchases Returns and Allowances	A-II-1	Journalize the following kinds of new transactions: Purchase of merchandise for cash Purchase of merchandise on account Sale of merchandise for cash Sale of merchandise on account Cash received on account Buying supplies on account Cash withdrawal by the owner using a drawing account Correcting entries Customer returns merchandise Return a previously made purchase on account.
A-II-2	Ledgers Subsidiary General Accounts and their relationship to subsidiary ledgers Posting Subsidiary Ledgers General Ledger Schedules of Accounts Payable and Accounts Receivable Use of Automated Equipment for recording and Posting entries	A-II-2	Describe the relationship between an accounts receivable subsidiary ledger and an accounts receivable control account. Also describe the relationship between an accounts payable subsidiary ledger and an accounts payable control account. After accounts receivable and accounts payable concepts have been presented and the students have a good background in the relationship of the subsidiary ledgers and the general ledger, give them activities using Accounts Receivable and Accounts Payable software packages on the microcomputer. Prepare flowcharts for an automated system of handling accounts receivable and accounts payable.

ACCOUNTING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-II-3	Banking Checking accounts Checks and check register Deposits Endorsements Reconciliation of bank statements	A-II-3	Prepare a display of documents (including checks, deposit slips, etc.) from various banks. Explain how MICR (Magnetic Ink Character Recognition) is used by banks. Arrange a field trip to a bank to see how MICR is used or have a speaker from the bank. Refer to Record Keeping for additional activities.
A-II-4	Worksheet and Adjustments Financial reports for a merchandise business Income statement Balance sheet Adjusting and closing entries Closing and balancing the ledger Post-closing trial balance	A-II-4	Prepare an income statement with a cost of merchandise sold section from data on a completed work sheet: showing a net income showing a net loss Prepare a capital statement from data on a completed work sheet and in a capital account: showing an investment of additional capital showing a withdrawal of assets showing a profit or a loss from a business's operations Journalize adjusting entries from data on a completed work sheet for: beginning merchandise inventory ending merchandise inventory supplies prepaid insurance Journalize the following four closing entries from data on a completed work sheet to: close income statement accounts with credit balances close income statement accounts with debit balances record net income or net loss in the capital account close the drawing account into the owner's capital

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Automation Application of data processing to accounting systems Automated office equipment Electronic Computers in accounting		Students who complete the practice set ahead of time may automate the set if the software and a computer system is available. This makes a good group project. Have students prepare a survey to be given to work experience students (co-op programs) to find out what kinds of automated equipment is being used in the businesses where they are working. Visit a merchandising-type business that has point-of-sale terminals or cash registers. Learn how these are being used for accounting purposes and inventory control.

ACCOUNTING CRITERION-REFERENCED TEST

LEVEL II

A-II-1 JOURNALIZING TRANSACTIONS TEST

Provide student with the necessary journal forms and a list of at least 20 transactions relating to a merchandising-type business. Have the student record these transactions. The transactions should include:

A. Sale of merchandise for cash
B. Sale of merchandise on account
C. Return of merchandise for credit
D. Purchase of merchandise for cash
E. Purchase of merchandise on account
F. Return of merchandise for credit (customer)
G. Cash payments
H. Cash receipts
I. Correcting entries
F. Withdrawal of cash by owner
G. Return to a creditor a purchase previously made on account

A-II-2 SUBSIDIARY LEDGER TEST

Provide the student with a journal containing prerecorded transactions including the types listed above in Test A-II-1. Provide general ledger and subsidiary ledgers containing prerecorded balances. The student should post the journal entries and then prepare a schedule of accounts payable and a schedule of accounts receivable.

A-II-3 BANKING TEST

Provide students with a check register, blank checks, and a bank statement. From a list of transactions, the student will make the entry in the check register, write the checks and reconcile the bank statement.

A-II-4 END-OF-MERCHANDISING CYCLE TEST

Provide the student with an eight-column worksheet with the trial balance prerecorded:

1. From a given ending merchandise inventory, an ending supplies inventory, and a balance of prepaid insurance, the student will make the necessary adjustments and complete the worksheet.
2. Record and post the adjusting and closing entries.
3. Prepare an income statement and balance sheet.
4. Balance the ledger and prepare a post-closing trial balance.

ACCOUNTING - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
A-III-1	Given time cards, tax withholding tables, and appropriate forms	the student will prepare a payroll register, complete employee's earnings record for each employee, and journalize the entries to record payroll, employer's taxes, and payment of salaries and taxes	with 100 percent accuracy.
A-III-2	Given transactions and a cash payments journal	the student will journalize transactions to establish a petty cash fund and to replenish the petty cash fund	with 100 percent accuracy.
A-III-3	Given a blank Form 1040A	the student will complete the form	with 100 percent accuracy.
A-III-4	Given a general journal and transactions estimating uncollectible accounts, writing off accounts as uncollectible, and collection of previously written off accounts	the student will journalize the transactions	with 100 percent accuracy.
A-III-5	Given a general journal and transactions acquiring plant assets, recording straight-line depreciation, and disposing of plan assets	the student will journalize the transactions	with 100 percent accuracy.
A-III-6	Given journals and transactions for notes payable and notes receivable	the student will journalize the transactions	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-III-1	Payroll Payroll Register Gross Pay Deductions FICA Federal Inc. Tax State Inc. Tax Other Insurance Union Dues Bonds Employee's Earnings Records Journal Entries Recording Payroll Recording Employer's Taxes FICA Federal Unemployment State Unemployment Paying Salaries Paying Taxes & Filing Tax Reports FICA & Fed. Income State Income Fed. Unemployment State Unemployment Other Deductions	A-III-1	Collect various types of payroll forms (time cards, time sheets, payroll registers, tax forms—W-4, W-2, Employer's tax reports, etc.). Use these for class discussion and/or bulletin board display. Visit the payroll department of a local business. NOTE: The following activities are designed to be done as one unit since each activity uses the results from the previous activity. Have students find an ad in a local newspaper for an accounting job. Using the salary they would receive if they obtained the desired job, have them complete their own employee's earnings record. Divide students into small groups to complete a payroll register assuming all the students in the group are working in the same company and using the employee's earnings records they have just completed. Journalize the entries to record this payroll, the employer's taxes on this payroll, and payment of the payroll and related taxes. Prepare the necessary Employer's Tax Reports.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-III-2	Petty Cash Establishing Fund Replenishing Fund Cash Short and Over	A-III-2	Divide the class into groups of 4 or 5 students in each group. Use small card file boxes as a Petty Cash Box and distribute one Petty Cash Box to each group. Have paper money ("coins" and "bills") as well as Petty Cash Vouchers in the petty cash box and assign one student in each group as the petty cash custodian. Have the petty cash custodian record the journal entry to establish the Petty Cash Fund (other students in the group may assist with this). Give each of the other students in each group a list of items needed from petty cash. The student receiving payment from petty cash should complete the petty cash voucher and the petty cash custodian should check the voucher for accuracy before initialing it and giving the student the appropriate amount of "cash" from the petty cash box. The petty cash custodian should record the cash disbursements on a petty cash analysis sheet (other students in the group may assist the petty cash custodian). Each student who has received cash should do the journal entries to record the transactions for which cash was received. Each student in the group should then do the journal entries to replenish the petty cash fund. Have students check with bookstore to see how they handle petty cash. Prepare some cash register tapes indicating receipts for each day of one month (if cash register is not available, an adding machine tape could be substituted or possibly a local business would provide some tapes). Give each student a cash register tape and the figure for actual cash in the drawer at the end of the day (after the change fund has been removed). Have the student prepare the necessary journal entry to record the cash short or over. NOTE: For additional practice, have the students exchange cash register tapes and figures for actual cash in the drawer.

ACCOUNTING - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-III-3	Income Taxes Form 1040A Form 1040	A-III-3	Have students prepare a Form 1040A and a Form 1040 (with no schedules) NOTE: An Income tax kit is available from IRS free of charge.
A-III-4	Uncollectible Accounts Journal Entries Bad Debts Expense Allowance for Bad Debts Placement of Valuation and Expense Accounts on Financial Statements Writing off Uncollectible Accounts Recording Collection of Previously Written Off Accounts	A-III-4	Invite a guest speaker from a local collection agency or collection department of a local bank to discuss problems that arise for a business when customers do not pay their accounts. Give students some estimates of uncollectible accounts. Have students record the necessary journal entries. Give students some situations in which an account is determined to be uncollectible. Have students write off the account. Have students record the collections of some of the accounts written off in the previous activity.
A-III-5	Plant Assets and Depreciation Acquisition of Property, Plan, and Equipment Straight-line depreciation Disposition Discarding Selling Trading-In	A-III-5	Give students the purchase price and estimated life of various items of plant assets. Have them compute the annual depreciation using straight-line depreciation. Using the annual depreciation figures computed in the previous activity, give the students the purchase date. Have them record the journal entry for each item for two successive years and compute the book value of the asset at the end of each year. Using the annual depreciation and purchase dates from the previous activity, have the studnets journalize the disposition of the various plant assets. Give them the disposition dates and include situations where the item was discarded, sold at book value, sold at a gain, sold at a loss, and traded in.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Plant Assets and Depreciation (Continued)		NOTE: If data processing equipment is available, records of plant assets, depreciation, and book value could be kept on the computer to integrate data processing concepts as applied to accounting.
A-III-6	Promissory Notes Notes Receivable Notes Payable Non-Interest Bearing Notes Recording Interest Discounts Dishonored Notes	A-III-6	NOTE: The following activities are intended to be done together as one unit in the order presented below. Give students blank promissory note forms. Group students in pairs. Have each student complete a promissory note with their partner as payee and the place of payment being your classroom or school bookstore. For this first activity, have the note be noninterest bearing. Have each student journalize the note payable they have just written. Have students exchange notes with their partner and journalize the note receivable they now have. Have students change partners and each student write a new promissory note to their new partner. This time it should be an interest-bearing note. Each student records the new note as a note payable. Have students exchange notes with their partner again. Students now record their note receivable. Using the notes completed in the above activity, have students compute the amount of interest due on their note assuming the note was held for a full year. Then have them compute interest assuming the note was held for 6 months, 3 months, 1 month, 30 days, 60 days, 90 days, etc. Then have students compute the interest due using various interest rates.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Promissory Notes (Continued)		Keeping students with the same partners with which they wrote the interest-bearing notes, have each student journalize payment of the note written (note payable). Have students exchange notes and journalize receipt of the payment from their partner (note receivable). Give additional practice with these journal entries by varying the payment due dates and the interest rates. Have students write a promissory note to a local bank. Each student should journalize the transaction issuing the note payable, assuming the bank discounts the note. Students should then journalize payment of the discounted note. (For additional practice, various interest rates and payment dates can be used.) Pair students with one of their previous partners. Each student should have the original promissory note written by the partner. Have students journalize the transactions assuming their partner does not pay the note when due. Again, this can be expanded by changing partners and/or varying the principal amount, interest rate, and/or payment due date. SUGGESTION: As an additional activity, have one or more students keep the treasurer's book and/or audit FBLA, the DE Store, or other organizations within the school.

ACCOUNTING CRITERION-REFERENCED TESTS

LEVEL III

A-III-1 PAYROLL TEST

Give the student six time cards, a payroll register including marital status and voluntary deductions for those employees, the year-to-date earnings records for those same employees, the tax withholding tables, and the necessary journals. Have the student compute the gross pay, deductions, and net pay for each employee; prepare the payroll register; update the employee's earnings record for each employee; and journalize the transactions recording the payroll, employer's taxes, payment of salaries, and payment of taxes. This measurement must be 100 percent accurate.

A-III-2 PETTY CASH TEST

Give the student a cash payments journal, 12 petty cash vouchers, and a petty cash analysis sheet. Have the student record the journal entry to establish a petty cash fund, complete the petty cash analysis sheet, and record the entry replenishing the petty cash fund. This measurement must be completed with 100 percent accuracy.

A-III-3 INCOME TAX TEST

Give the student a Form 1040A and a situation similar to the problem in Activity A-III-3. Have the student complete the Form 1040A. This test must be completed with 100 percent accuracy.

A-III-4 UNCOLLECTIBLE ACCOUNTS TEST

Give the student 10 transactions to record in a general journal. Be sure to include some transactions estimating bad debts, writing off uncollectible accounts, and recording collection of previously written-off accounts. Have the student journalize the transactions. These entries must be completed with 100 percent accuracy.

A-III-5 PLANT ASSETS AND DEPRECIATION TEST

Give the student 10 transactions to record in a general journal. Be sure to include some transactions acquiring plant assets, recording straight-line depreciation, and disposing of plant assets (discarding, selling, and trading-in). Have the student journalize the transactions. These entries must be completed with 100 percent accuracy.

A-III-6 PROMISSORY NOTES TEST

Give the student 12 transactions to record in a general journal. Be sure to include some transactions issuing notes receivable, issuing notes payable, recording payment of interest and notes payable, issuing notes payable at a discount, and recording dishonored notes. Have the student journalize the transactions. These entries must be completed with 100 percent accuracy.

COMPETENCY PROFILE
for
ACCOUNTING

LEVEL I		DATE QUALIFIED	INITIALS
A-I-1	Beginning Theory		
A-I-2	Journalizing, Posting, Trial Balance		
A-I-3	Beginning Cycle Completed (Service)		
	Worksheet		
	Income Statement		
	Balance Sheet		

LEVEL II			
A-II-1	Journalizing Merchandising Transactions		
A-II-2	Subsidiary Ledgers		
	Schedule of Accounts Receivable		
	Schedule of Accounts Payable		
A-II-3	Banking		
A-II-4	Completion of Merchandising Cycle		
	Eight-Column Worksheet		
	Adjusting and Closing Entries		
	Financial Statements		
	Post-Closing Trial Balance . .		

LEVEL III		DATE QUALIFIED	INITIALS
A-III-1	Payroll		
A-III-2	Petty Cash . .		
A-III-3	Income Taxes .		
A-III-4	Uncollectible Accounts . .		
A-III-5	Plant Assets and Depreciation		
A-III-6	Promissory Notes		

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

ACCOUNTING - LEVEL IV

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
A-IV-1	Given the necessary forms and balance sheets for two individuals, the amount of income earned by the new partnership the first year, and the method for distributing net income	the student will record the opening entry to establish the partnership, journalize the distribution of net income, and prepare a Captial Statement	with 100 percent accuracy.
A-IV-2	Given the necessary forms and registers, invoices (including a variety of purchases) and memos (with transactions)	the student will verify the invoices, prepare the vouchers, write the voucher checks, and complete the voucher register and check register	with 100 percent accuracy.
A-IV-3	Given a general journal, the necessary information to estimate uncollectible accounts, and transactions writing off accounts and collecting previously written off accounts	the student will journalize the entries estimating uncollectible accounts using the aging of accounts receivable method, writing off accounts, and collecting previously written off accounts	with 100 percent accuracy.
A-IV-4	Given a general journal and information regarding acquisition and expected useful life of plant assets, and disposition of plant assets	the student will record the transactions acquiring, depreciating, and disposing of the plant assets	with 100 percent accuracy.

COMPETENCY GOAL (Continued)

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
A-IV-5	Given situations and information for computing inventory values by various methods	the student will determine cost of goods sold and gross profit on sales for each situation	with 100 percent accuracy.
A-IV-6	Given a journal and transactions involving prepaid or accrued revenues and expenses	the student will journalize the adjusting and reversing entries	with 100 percent accuracy.
A-IV-7	Given a general journal and a variety of transactions involving issuance of corporate stocks and bonds (including dividends)	the student will record the required journal entries for issuance of stocks and bonds, declaration of dividends, and payment of dividends	with 100 percent accuracy.
A-IV-8	Given the necessary information regarding inventories for a manufacturing business and the required forms	the student will complete a materials ledger, job cost sheets, and work sheet and then prepare a Statement of Cost of Goods Manufactured, Income Statement, and Balance Sheet	with 100 percent accuracy.
A-IV-9	Given an objective test covering budgeting, cost characteristics, analyzing financial statements, and statements of changes in financial position	the student will complete the test	with 80 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-IV-1	Partnerships Forming the Partnership Characteristics, Advantages, and Disadvantages Opening Entries Dividing Partnership Earnings Terminating a Partnership End-of-Fiscal Period Work Adjusting and Closing Entries Capital Statement Partnership Tax Returns	A-IV-1	Invite guest speakers who are partners in a business. Divide students into groups of 2 or 3 and have them form a partnership. Let them decide what their initial capital will be and what each partner will contribute to their partnership. Have them record the opening entry for their partnership. Using the same partnerships as in the previous activity, have the students divide their partnership earnings and record the appropriate journal entries. Use various methods of distributing the same net income to illustrate the difference in the partner's net income or loss depending upon the earnings distribution method used. Have the student divide the net income equally according to a fixed ratio, (for example, 60 percent to one partner and 40 percent to the other), according to ratio of their capital investment to total capital, allowing interest on each partner's capital investment, allowing a salary to one or more partners, and using a combination of the above methods. Be sure to include some situations resulting in a net loss to one or more partners. Using the same partnerships and journal entries as in the previous activity, have students prepare a Distribution of Net Income Statement for each situation. Given data needed for adjustments, have students complete a work sheet for a partnership.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Partnerships (Continued)		Provide the information for distribution of net income for the partnership in the previous activity. Have students use the work sheet prepared in the previous activity to prepare the Distribution of Net Income Statement, Capital Statement, Income Statement, and Balance Sheet. Record the adjusting and closing entries and prepare a Post-Closing Trial Balance for the partnership in the previous activity.
A-IV-2	Voucher System Internal Control Voucher Register Preparing Vouchers Recording Transactions Proof of Vouchers Payable Account	A-IV-2	Provide students with invoices for a variety of purchases. Have student verify the invoices. Provide students with blank voucher forms and have students prepare vouchers for the invoices verified in the previous activity. Also provide some memoranda for transactions involving purchases returns and allowances, payroll, and replenishing petty cash. Have students prepare vouchers for these transactions also. Given a voucher register, have students record the vouchers prepared in the previous activity. Provide students with blank voucher checks and a check register. Have them pay the vouchers prepared in previous activities by writing the checks, recording the checks in the check register, and maintaining a paid vouchers file.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-IV-3	Uncollectible Accounts Methods of Estimating Uncollectible Accounts Aging of Accounts Receivable Percentage of Charge Sales Journal Entries Bad Debts Expense Allowance for Bad Debts Placement of Valuation and Expense Accounts on Financial Statements Methods of Writing off Accounts Direct Method Allowance Method Recording Collection of Previously Written off Accounts	A-IV-3	Give students sample accounts receivable and charge sales figures and have them estimate the amount of uncollectible accounts in each case, using both the aging of accounts receivable and the percentage of charge sales methods. Using the estimates of uncollectible accounts from the previous activity, record the journal entry for each case. Give students situations in which an account is determined to be uncollectible. Have students write off the account using the direct write-off method and using the allowance method. Have students record the collections of some of the accounts written off in the previous activity.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-IV-4	Plant Assets and Depreciation Classification and Acquisition of Property, Plant, and Equipment Real Property Personal Property Buildings Furniture and Fixtures Equipment Intangible Property Patents Copyrights Trademarks Goodwill Valuation Methods of Depreciation Straight-Line Declining Balance Sum-of-the-Years Digits Production Unit Methods of Depletion Cost Percentage Amortization of Intangibles Disposition Discarding Selling Trading In	A-IV-4	Give students a list of various types of plant assets and have them classify the items as real, personal, or intangible property. Give students the purchase price and estimated life of various items of plant assets. Have them compute the annual depreciation by the various methods (straight-line, declining balance, sum-of-the-years digits and, where applicable, production units. Compare the annual depreciation computed by the various methods for each item. Where applicable compute depletion or amortization. Using the annual depreciation, depletion, or amortization figures computed in the previous activity, give the students the purchase date and method of depreciation to be used for each item. Have them record the journal entry for each item for two successive years and compute the book value of the asset at the end of each year. NOTE: The purchase dates should be varied enough to include semiannual, quarterly, monthly, and partial months. The depreciation methods should be varied. Some situations using depletion and amortization should also be included. Using the annual depreciation, purchase dates, and depreciation methods from the previous activity, have the students journalize the disposition of the various plant assets. Give them the disposition dates and include situations where the item was discarded, sold at book value, sold at a gain, sold at a loss, and traded in. If data processing equipment is available, records of plant assets, depreciation, and book value could be kept on the computer to integrate data processing concepts as applied to accounting.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
A-IV-5	Inventory Valuation Costing Methods— Computation and Comparison Specific Identification Average Cost LIFO FIFO Lower Cost or Market Inventory Control Periodic Perpetual Estimation Procedures Gross Profit Retail Method	A-IV-5	Give students figures for total net sales, number of units and unit cost for beginning inventory, number of units purchased at various unit costs, and number of units in ending inventory. Have students compute the value of the ending inventory, the cost of goods sold, and the gross profit on sales using the average cost method. Using the same information for sales and inventories given in the previous activity, have students compute the value of the ending inventory, cost of goods sold, and gross profit on sales using the LIFO method. Compare the results with those obtained in the previous activity. Using the same information for sales and inventories given in the first activity, have students compute the value of the ending inventory, cost of goods sold, and gross profit on sales using the FIFO method. Compare these results with those obtained in the first two activities. Using the results obtained in the three previous activities, give students the market value of each of the items. Have students compute the value of the ending inventory, cost of goods sold, and gross profit on sales using the Lower of Cost or Market method for each of the three previous costing methods. Give the students some figures for beginning inventories and net purchases. Using various gross profit ratios, have students estimate the value of the ending inventories. Give students some figures for beginning inventory (cost and retail), merchandise purchases (cost and retail) and total sales (at retail). Have students estimate the value of the ending inventory and the cost of goods sold.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Inventory Valuation (Continued)		Invite 2 to 3 local business people to have a panel discussion on the advantages and disadvantages of the various inventory pricing methods. Make sure each guest uses a different method. NOTE: If data processing equipment is available, inventory records can be kept on the computer to integrate data processing concepts applied to accounting.
A-IV-6	Accruals and Deferrals Accrued Expenses Salaries (Wages) Payroll Tax Interest on Notes Payable Property Tax Interest on Notes Receivable Deferred Expenses and Revenues Supplies Unexpired Insurance Prepaid Interest on Notes Payable Subscriptions Reversing Entries	A-IV-6	Give students sample transactions involving prepaid expenses and revenues and accrued expenses and revenues and have them journalize the required adjusting entries. Have students journalize the reversing entries for the transactions given in the previous activity. Give students transactions involving prepaid items recorded initially as revenues and expenses. Have them journalize the necessary adjusting entries.
A-IV-7	Corporations Formation Structure Advantages and Disadvantages Organization Costs	A-IV-7	Invite an attorney to speak to your class about the structure, advantages, and disadvantages of the corporate form of organization. Discuss the articles of incorporation and requirements for incorporating.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Corporations (Continued)		
	Corporate Dividends Declaration Payment		Give students a variety of transactions to journalize involving declaration of dividends and payment of dividends.
	Analyzing Corporate Equity Equity Per Share Earnings Per Share Market Value Per Share Price-Earnings Ratio		Analyze corporate equity by determining equity per share, earning per share, market value per share, and price-earnings ratio.
A-IV-8	Cost Accounting For a Merchandising Business Elements of Manufacturing Cost Direct Materials Direct Labor Factory Overhead Inventory Records for a Manufacturing Business Direct Materials Work in Process Finished Goods End of Fiscal Period Work for a Manufacturing Business Work Sheet Statement of Cost of Goods Manufactured Income Statement Balance Sheet	A-IV-8	Invite 2 to 3 local business people (one at a time) to discuss the advantages and disadvantages of their particular inventory pricing method. Students should take notes and the day following the presentations have a panel discussion about the results of the discussions. If a video tape is available, it would be advantageous to tape each discussion. Prepare a work sheet for a departmentalized merchandising business. Using the completed work sheet, prepare a Departmental Margin Statement for each department and an Income Statement for the business. Identify the various elements of factory overhead. Provide students with a materials ledger and some purchase orders. Have the students record the purchase of manufacturing materials in the materials ledger. Provide students with job cost sheets, direct materials requisitions, and time cards indicating amount of time spent on each job. Have students allocate the direct materials and direct labor among the various jobs.

CODE | OUTLINE | CODE | LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Corporations (Continued)

- Capital Stock
  - Kinds of Stock
    - Common vs. Preferred
    - Cummulative vs. Noncumulative
    - Participating vs. Nonparticipating
- Capital Accounts
  - Retained Earnings
  - Capital Stock
    - Common
    - Preferred
- Issuance of Stock
  - Capital Stock
  - Treasury Stock
- Corporate Bonds
  - Issuing Bonds
  - Paying Interest on Bonds
  - Bond Sinking Fund
  - Retiring Bonds
- Comparison of Stocks and Bonds
- End of Period Work
  - Work Sheet
  - Statement of Stockholder's Equity
  - Adjusting and Closing Entries
  - Income Statement
  - Balance Sheet
  - Post-Closing Trial Balance
  - Federal Tax Return

Invite a stockbroker to discuss characteristics, advantages, disadvantages, and relative cost of the various kinds of stock. Also includea discussion of the characteristics of corporate bonds and a comparison of bonds and stocks.

Give students a variety of transactions involving stocks and have them journalize the appropriate entries. Include issuing initial capital stock, stock subscriptions, cash received on stock subscriptions and issuance of stock previously subscribed.

Have students journalize a variety of transactions involving issuance of additional capital stock--at par value, with no par value, at amounts in addition to par or stated value, at a discount, and for assets other than cash.

Have students journalize a variety of transactions involving purchase of treasury stock and selling treasury stock at cost price, above cost price, and below cost price.

Have students journalize a variety of transactions involving bonds--issuing bonds payable, paying interest on bonds payable, establishing a bond sinking fund, and retiring bonds payable.

Have students prepare a work sheet, income statement, statement of stockholders' equity, and balance sheet. Record the adjusting and closing entries. Prepare a post-closing trial balance and Federal Income Tax Return for the corporation.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Cost Accounting (Continued)		Using the job cost sheets and time cards from the previous activity, give the students the figures for various indirect costs as well as the factory overhead rate and have them apply the factory overhead among the various jobs. Also determine the unit cost of the finished items, assuming all of the jobs have been completed. Using the purchase orders materials requisitions, time cards, and job cost sheets given in the previous 3 activities, provide students with the figure for beginning materials inventory and have them prepare a Statement of Cost of Goods Manufactured, an Income Statement and a Balance Sheet for the manufacturing business.
A-IV-9	Information for Management Decisions Budgeting Designing a Budget Budgeted Income Statement Cash Budget Cost Characteristics Variable vs. Fixed Total vs. Unit Contribution Margin vs. Gross Profit Analyzing Financial Statements Comparative Financial Statements Earnings Performance Rate of Return Earnings Per Share	A-IV-9	Invite a financial officer of a large business or corporation in your area to speak to your class about the budgeting process they use. Discuss the role of the budgeted income statement and the cash budget in the preparation of the overall budget for the company. Provide students with samples for two previous years of the sales budget, purchases budget, selling expense budget, administrative expense budget, and other revenue and expense budget for a fictitious company. Have student develop a budgeted income statement for the company. Give students the actual income statement for the end of the year for the company for which they prepared the budgeted income statement in the previous activity. Have students prepare a Comparison of Budgeted Income Statement With Actual Income Statement.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Information for Management Decisions (Cont.) Short-Term Financial Strength Current Ratio Acid Test Ratio Statement of Changes in Financial Position Working Capital--Sources and Uses Statement of Changes in Working Capital Work Sheets		Provide students with the cash receipts schedule and cash payments schedule for a fictitious company for the previous two years. Have students prepare a cash budget. Invite a cost accountant to speak to your class to discuss cost characteristics and have students classify different kinds of costs as either variable or fixed. Discuss the concepts of total cost vs. unit costs; gross profit on operations vs. contribution margin. Review various comparative financial statements. Compare the statements by trend analysis, component percentage, and ratio analysis. Give students some problems requiring them to compute the following measures of earnings performance: rate of return on average total assets, rate of return on average owners' equity, rate of return on net sales, earnings per share. Give students some sample problems to compute current ratio and acid-test ratio. Have students prepare a schedule of changes in working capital. Using the schedule prepared, discuss the sources and uses of working capital.

ACCOUNTING CRITERION-REFERENCED TEST

LEVEL IV

A-IV-1 PARTNERSHIPS TEST

Give the student a general journal and the balance sheets for two individuals who wish to form a partnership. Also provide the amount of net income earned by the new partnership during the first year and the method the partners have chosen for distributing net income. Have the student record the opening entry to establish the partnership, journalize the distribution of the net income, and prepare a Capital Statement for the partnership at the end of the first year. This work should be done with 100 percent accuracy.

A-IV-2 VOUCHER SYSTEM TEST

Give the student 6 completed invoices, 4 completed memos, 10 blank voucher forms, 10 voucher checks, a voucher register, and a check register. The invoices should include a variety of purchases. The memos should include transactions involving purchases returns and allowances, payroll, and replenishing petty cash. Have the student verify the invoices, prepare the vouchers for the invoices and memos, write the voucher checks, and complete the voucher register and check register with 100 percent accuracy.

A-IV-3 UNCOLLECTIBLE ACCOUNTS TEST

Give the student a general journal and a schedule of accounts receivable with date of last payment indicated for each account. Have the student estimate the amount of uncollectible accounts using the aging of accounts receivable method and record the journal entry for uncollectible accounts. Provide the student with a memo indicating which accounts are determined to be uncollectible and have the student journalize the entry writing off the account. Provide another memo indicating collection of a previously written-off account and have the student journalize the required entry. This work should be completed with 100 percent accuracy.

A-IV-4 PLANT ASSETS AND DEPRECIATION TEST

Give the student a general journal and a list of transactions acquiring plant assets (some directly purchased and some acquired through trade-ins) and have the student record the necessary journal entries. The acquisition of the various assets should take place on different dates throughout one or more years, and the expected useful life for each asset should be indicated. Some of the assets should be items requiring depletion and amortization. Have the student journalize the depreciation, depletion, and amortization of the various plant assets. (Be sure each of the following depreciation methods is used at least once: straight-line, declining balance, sum-of-the-year's digits, and production units.) Provide the student with transactions disposing of various plant assets and have the student journalize the entry recording the disposition. (Be sure to include some situations discarding the asset, selling the asset at book value, selling the asset at a gain, selling the asset at a loss, and trading-in the asset.) This work should be completed with 100 percent accuracy.

ACCOUNTING CRITERION-REFERENCED TEST

LEVEL IV (Continued)

A-IV-5 INVENTORY VALUATION TEST

Provide the student with figures for total net sales and necessary information for computing inventory values. Be sure to include situations using each of the following methods: specific identification, average cost, LIFO, FIFO, and Lower of Cost or Market. Also use situations requiring the student to estimate inventory value using the gross profit method and the retail method. Have the students determine cost of goods sold and gross profit on sales for each situation. This test should be completed with 100 percent accuracy.

A-IV-6 ACCRUALS AND DEFERRALS TEST

Give the student a general journal and 10 transactions involving prepaid and accrued revenues and expenses (include some prepaid items recorded intially as revenues and expenses). Have the student journalize the required adjusting and reversing entries with 100 percent accuracy.

A-IV-7 CORPORATIONS TEST

Give the student a variety of transactions involving issuance of capital stock (at par value, with no par value, at amounts above and below par value, for previous subscriptions, and for assets other than cash), issuance of bonds payable, paying interest on bonds payable, establishing a bond sinking fund, retiring bonds payable, declaring dividends, and paying dividends. Have the students journalize the various transactions with 100 percent accuracy.

A-IV-8 COST ACCOUNTING TEST

Provide the student with a work sheet, accounting statement forms, and the following information for a manufacturing business: beginning materials inventory figures, a materials ledger, purchase orders, job cost sheets, direct materials requisitions, time cards, figures for indirect costs, the factory overhead rate, and the necessary accounting forms. Have the student complete the materials ledger, job cost sheets, and the work sheet. Using the work sheet, prepare a Statement of Cost of Goods Manufactured, Income Statement, and Balance Sheet. This work should be completed with 100 percent accuracy.

A-IV-9 MANAGERIAL ACCOUNTING TEST (Competency Standard: 80%)

Section 1--Budgeting

Give the student a variety of expense items for previous years and have the student identify for which type of budgeted schedule the item would be used.

Section 2--Cost Characteristics

Give the student a list of different kinds of costs and have the student classify the costs as either fixed or variable.

Section 3--Analyzing Financial Statements

Give the students some problems requiring them to compute rate of return on average total assets, rate of return on average owners' equity, rate of return on net sales, earnings per share, current ratio, and acid test ratio.

Section 4--Statement of Changes in Financial Position

Give a Work Sheet for Analyzing Changes in Financial Position and a partially completed Statement of Changes in Financial Position; have the student fill in the missing information.

COMPETENCY PROFILE
for
ACCOUNTING--LEVEL IV

Student Name________________________________ Starting Date________________

Completion Date________________

		Date Qualified	Initials
A-IV-1	Partnerships		
A-IV-2	Voucher System		
A-IV-3	Uncollectible Accounts		
A-IV-4	Plant Assets and Depreciation		
	Acquisition		
	Valuation		
	Disposition		
A-IV-5	Inventory Valuation		
A-IV-6	Accruals and Deferrals		
A-IV-7	Corporations		
	Stocks		
	Bonds and Dividends		
A-IV-8	Cost Accounting for a Merchandising Business		
A-IV-9	Managerial Accounting		
	Budgeting		
	Cost Analysis		
	Analyzing Financial Statements		
	Statement of Changes in Financial Position		

Certificate of Competency Awarded ________________________
Date Initials

LEVEL I

_______ Journalizing
_______ Posting
_______ 6-Column Work Sheet

LEVEL II

_______ Merchandising Transactions
_______ Subsidiary Ledgers
_______ Banking
_______ 8-Column Work Sheet
_______ Adjusting and Closing Entries
_______ Income Statement and Balance Sheet
_______ Post-Closing Trial Balance

LEVEL III

_______ Payroll
_______ Petty Cash
_______ Income Taxes
_______ Uncollectible Accounts
_______ Plant Assets and Depreciation (Straight-Line)
_______ Promissory Notes

LEVEL IV

_______ Partnerships
_______ Voucher System
_______ Uncollectible Accounts
_______ Plant Assets and Depreciation (Various Methods)
_______ Inventory Valuation (Various Methods)
_______ Accruals and Deferrals
_______ Corporations
_______   Stocks
_______   Bonds
_______ Cost Accounting for a Mfg. Business
_______ Managerial Accounting
_______   Budgeting
_______   Cost Analysis
_______   Analyzing Financial Statements
_______   Statement of Changes in Financial Position

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

ACCOUNTING

Completion Date ____________ School ______________________________

Instructor ____________________________

DATA/INFORMATION PROCESSING - DESCRIPTION

Data information processing is nothing new in the office world. However, the methods of performing it are rapidly changing and so must the curriculum in business education. Not all students will be programmers, but all students will be working with the input and output from computers; and many will come in direct contact with input and output devices. The equipment available in the classroom will partly determine what the curriculum can be. Many schools now have access to a computer through time-sharing and have terminals in the classrooms. With the decreasing cost of the microcomputers it should soon be possible for any classroom to have some type of computer equipment. The microcomputer can also serve a dual purpose as word processing equipment.

Level I of this section requires no equipment and could be used as an introduction. Level II would require terminals and/or a microcomputer with storage and printer capabilities. This level is designed for those students who need to know how to use the computer but not program it. Level III requires terminals and/or a microcomputer with the BASIC language. This level is designed for those students who need to become proficient in writing business programs in BASIC.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona state sanctioned co-curricular student organization. Competitive events: Data Processing I, Data Processing II, and Office Procedures.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Computers Then, Now, and in the Future Understanding Electronic Computers Input/Output and Storage Program Development and Languages Data Communications Data Base and Distributed Data Processing	Using Terminals in a Timesharing System Creating and Revising Files in a Timesharing System File Inquiry and File Maintenance in a Timesharing System Initializing and Setting Up a Mailing List Updating and Sorting a Mailing List Printing Mailing Labels Using Word Processing Software	Getting Started in BASIC Formatting, Totaling, and Comparing Responding to the Computer Taking Subtotals Creating Loops and Using Tables Creating, Maintaining, and Using Data Files Using Graphics	

DATA/INFORMATION PROCESSING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
D/IP-I-1	Given an objective test covering history, applications, and careers in data processing	the student will complete the test	with 80 percent accuracy.
D/IP-I-2	Given an objective test covering functions of computers and data representation	the student will complete the test	with 80 percent accuracy.
D/IP-I-3	Given a multiple choice test covering input/output and storage	the student will complete the test	with 80 percent accuracy.
D/IP-I-4	Given a multiple choice test covering program development and languages	the student will complete the test	with 80 percent accuracy.
D/IP-I-5	Given a multiple choice test covering data communications	the student will complete the test	with 80 percent accuracy.
D/IP-I-6	Given a multiple choice test covering data base and distributed data processing	the student will complete the test	with 80 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-I-1	Computers Then, Now, and in the Future Need For and Use of Computers History of Computers Generations of Computers Career Opportunities Future Trends	D/IP-I-1	Write a report on three different small computers which can be purchased for home or personal use. Newspapers, INFOSYSTEMS, OFFICE PRODUCTS, DATAMATION, COMPUTERWORLD, and other periodicals contain many articles on new developments in computer technology. Bring an article of interest to class and be prepared to give a brief summary of the article. HINT: Of the named periodicals, all but COMPUTERWORLD is free to the teacher if your name is on the mailing list. Discuss the concept of the "cashless-checkless" society. What problems need to be anticipated and resolved prior to adoption of a cashless-checkless system? Identify at least six positions available in data processing and explain worker characteristics, training, and education needed for each.
D/IP-I-2	Understanding Electronic Computers Terminology Function and Organization Input CPU Output Data Representation in Computers Data Codes Number Systems	D/IP-I-2	In a given amount of time, see how many punched cards containing data processing terms a student can interpret. Complete the following number conversion chart:

Decimal	Pure Binary	BCD	Octal	Hexidecimal
34				
	11000			
		0101 0011		
			72	
				10D

HINT: Terminology should be an integral part of each unit.

DATA/INFORMATION PROCESSING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-I-3	Input/Output and Storage Input/Output Media Input/Output Devices Main Storage Secondary Storage	D/IP-I-3	List as many different types of input media as you can find and describe how each is used and on what device. List as many different types of output media as you can find and describe how each is produced and on what device. Write a short description of each of the following types of storage and list the advantages and disadvantages of each: Core Storage; Drum Storage; Tape; Disk. Start a "show and tell" box in which you collect such things as: diskette, used disk pack, used reel of tape, 80-column card, 96-column card, old vacuum tube, transistor, miniaturized circuit or chip, old section of core memory, micro-fiche, various types of continuous forms or envelopes, or anything else relating to computers that you can find. Review articles in newspapers relating to errors which were "caused by the computer." Discuss "if" and "how" the errors mentioned could have been prevented by editing the data prior to processing the data on the computer.
D/IP-I-4	Program Development and Languages Source Documents Understanding the Problem Planning the Logic	D/IP-I-4	Visit some large businesses and some governmental organizations in your community to determine the type of programming languages and equipment used for business applications. Then visit some of the smaller businesses or professional organizations to determine what type of programming languages and equipment they use.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-I-4	Coding Testing and Debugging Documentation Levels of Languages	D/IP-I-4	Tell what is meant by a low-level language; a high-level language. Give examples of each. Describe the steps in the program development cycle. Discuss pseudocode. What are its advantages and disadvantages?
D/IP-I-5	Data Communications Components of Network Applications	D/IP-I-5	Discuss the basic components of a data communications system. Discuss a modem; an acoustic coupler. How are they used? Many retail stores now use computer terminals and data communications facilities for such applications as credit checking, check verification, and point-of-sale terminals. Visit a retail store and find out what use they make of data communications facilities. Explain these terms: simplex, half-duplex, full-duplex.
D/IP-I-6	Data Base and Distributed Data Processing	D/IP-I-6	State the definition of a data base. Discuss what problems a data base is designed to overcome. Data processing magazines, newspapers, and periodicals contain many articles on distributed processing and how it can be and is used. Prepare a report concerning how distributed processing is used in a particular system.

DATA/INFORMATION PROCESSING CRITERION-REFERENCED TESTS
LEVEL I

D/IP-I-1

COMPUTERS THEN, NOW, AND IN THE FUTURE TEST

Section 1: Computer Applications

Directions: Match the type of computer application on the right with the term on the left.

Sample Terms:

UPC
Point-of-sale Terminals
Perpetual Inventory
24-Hour Tellers
CRT in Offices

Sample Applications:

Teacher will need to supply these to fit the terms selected.

Section 2: Data Processing History

Directions: Number the following persons or contributions in chronological order.

Sample Items:

Abacus
Babbage's Difference Engine
Pascal's Mechanical Adding Machine
Hollerith's Punched Card

Teacher should supply additional items.

Section 3: Generations

Directions: After each generation given, list at least three advantages of that generation of hardware and software over the preceding one.

First Generation: 1.
2.
3.
Second Generation: 1.
Teacher should supply the rest of this section.

Section 4: Career Opportunities

Directions: Using the following career areas, write the letter of the correct career area in front of the education requirement or duty to be performed.

A. data entry
B. data control
C. computer operator
D. computer programmer

_____ 1. Punch cards from invoice source documents.
_____ 2. File source documents and cards after processing.
_____ 3. Debug a Program.

Teacher should supply additional educational requirements and duties.

DATA/INFORMATION PROCESSING CRITERION-REFERENCED TESTS
LEVEL I

D/IP-I-2

UNDERSTANDING ELECTRONIC COMPUTERS TEST

Section 1: Terminology

Directions: Match the definition on the right with the term on the left.

Sample Terms:	Sample Definitions:
Byte Fixed Word Length RAM Sequential Access	Teacher will need to supply these to fit the terms selected.

Section 2: Function and Organization

Directions: Select the correct response.

Sample Items:

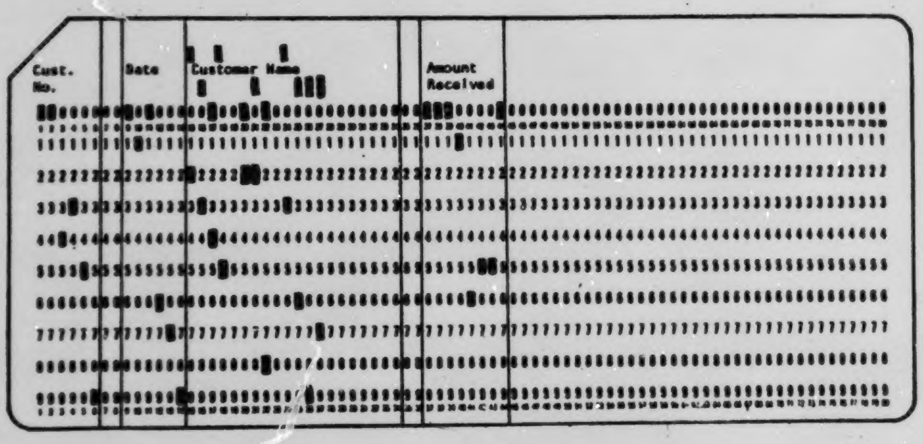
1. The input operation on a computer system:
   (a) causes data to be placed in main computer storage.
   (b) causes data to be moved from one location to another in main computer storage.
   (c) causes the results of computer processing to be printed or displayed in a usable form.
   (d) causes data to be prepared in a machine-readable format for input to a computer system.

2. A bit is:
   (a) the basic unit for storing data in main computer sotrage.
   (b) another name for a character stored in main computer storage.
   (c) the same as a byte.
   (d) an abbreviation for Basic Integrated Terminal.

Section 3: Number Conversions

Suggestion: Give another chart to be completed similar to the one in the activity in D/IP-I-2.

Section 4: Interpreting a Card



Using the card above, answer the following questions:

1. What is the Customer Number?____________
2. What is the Date?____________
3. What is the Customer Name?____________
4. What is the Amount Received?____________

DATA/INFORMATION PROCESSING CRITERION-REFERENCED TESTS
LEVEL I

D/IP-I-3 INPUT/OUTPUT AND STORAGE TEST

Section 1: Input/Output Media and Devices

Directions: Select the correct response.

Sample Items:

1. The most advanced form of keyboard data entry is:
   (a) key-to-tape data recorder.
   (b) key-to-screen data analyzer.
   (c) key-to-paper tape punch.
   (d) key-to-disk shared processer unit.
2. Printers which print a character at a time are:
   (a) character printers.
   (b) line printers.
   (c) serial printers.
   (d) single imprint printers.

Section 2: Storage

Directions: Select the correct response.

Sample Items:

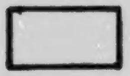
1. Auxiliary storage on most computer systems consists of:
   (a) punched cards.
   (b) main computer storage.
   (c) magnetic tape and magnetic disk.
   (d) the printed report and microfilm.
2. Magnetic disk is commonly referred to as:
   (a) direct access storage device -- DASD.
   (b) sequential access storage device -- SASD.
   (c) random retrieval storage device -- RRSD.
   (d) random access storage device -- RASD.

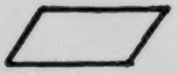
D/IP-I-4 PROGRAM DEVELOPMENT AND LANGUAGES TEST

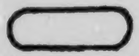
Directions: Select the correct response.

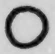
Sample Items:

1. Which of the following flowcharting symbols is used for general input/output operations?

(a) 

(b) 

(c) 

(d) 

2. A hard-copy list of the steps followed during program execution in the order they occurred is called a:
   (a) dump.
   (b) template.
   (c) trace.
   (d) compiler.
3. The most popular problem-oriented language is:
   (a) COBOL.
   (b) PL/1.
   (c) FORTRAN.
   (d) RPG.
4. An English-like description of the processing steps in a program that is becoming increasingly popular is:
   (a) quasicode.
   (b) pseudocode.
   (c) narrative code.
   (d) logic-code.

NOTE: Teacher will need to supply additional items for each of the above tests similar in degree of difficulty to the sample items above.

DATA/INFORMATION PROCESSING CRITERION-REFERENCED TESTS
LEVEL I

D/IP-I-5 DATA COMMUNICATIONS TEST

Directions: Select the correct response.

Sample Items:

1. A basic data communications configuration consists of:
   (a) a terminal and a computer system.
   (b) a terminal, a communications line, and a computer system.
   (c) a terminal, a communications line, modems, and a computer system.
   (d) None of the above.
2. An acoustic coupler:
   (a) is used exclusively with satellite communication links.
   (b) attached to a terminal converts the digital signals from a terminal to analog signals which can be transmitted over telephone lines.
   (c) is found at the site of the host computer system and is used to convert synchronous signals to asynchronous signals.
   (d) is useful only if the channel being used is capable of transmitting digital signals.
3. A half-duplex line:
   (a) allows data to be transmitted in one direction only.
   (b) allows data to be transmitted in two directions at the same time.
   (c) allows data to be transmitted in two directions, but only in one direction at a time.
   (d) None of the above.

D/IP-I-6 DATA BASE AND DISTRIBUTED D. P. TEST

Directions: Select the correct response.

Sample Items:

1. A data base is:
   (a) one or more fields comprising a record.
   (b) one or more characters comprising a field.
   (c) a collection of data which can be used by more than one application.
   (d) a type of auxiliary storage device used for storing active company records.
2. Major reasons for developing data bases include:
   (a) increasing data redundancy.
   (b) allowing data to be referenced by multiple applications.
   (c) allowing data to be stored and accessed independently of the type of auxiliary.
   (d) All of the above.
3. Distributed data processing is the concept of:
   (a) providing users with remote terminals to communicate with a central computer system.
   (b) providing microcomputers to individual users on an as-needed basis.
   (c) distributing data to various departments through computer terminals as directed by corporate management and controlled by a central computer.
   (d) utilizing a network of computers to locate computer power in the area where processing is required.

COMPETENCY PROFILE
for
DATA/INFORMATION PROCESSING -- LEVEL I

Student Name________________________________ Starting Date____________________

Completion Date____________________

		DATE QUALIFIED	INITIALS
D/IP-I-1	Computers Then, Now, and in the Future		
D/IP-I-2	Understanding Electronic Computers		
D/IP-I-3	Input/Output and Storage		
D/IP-I-4	Program Development and Languages		
D/IP-I-5	Data Communications		
D/IP-I-6	Data Base and Distributed Data Processing		

CERTIFICATE OF COMPETENCY AWARDED______________________________
Date Initials

DATA/INFORMATION PROCESSING - LEVEL II

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
D/IP-II-1	Given a data file	the student will use the sort utility to arrange the file by customer number, store it under another file name, display, print, and then delete the file.	with 100 percent accuracy.
D/IP-II-2	Given a rough draft document	the student will create a file, revise it, make additions to it, and have the file printed with justified margins	with 100 percent accuracy.
D/IP-II-3	Given a preexisting program written to maintain a file	the student will make additions, deletions, and changes	with 100 percent accuracy.
D/IP-II-4	Given a list of names, addresses, and select codes	the student will create and store on disk or tape a mailing list	with 100 percent accuracy.
D/IP-II-5	Given an existing mailing list stored on disk or tape and a list of changes to be made	the student will update the mailing list and sort it in alphabetic order	with 100 percent accuracy.
D/IP-II-6	Given blank mailing labels and an existing mailing list stored on disk or tape	the student will print mailing labels for all addresses with a selected ZIP Code	with 100 percent accuracy.
D/IP-II-7	Given a 2-page rough draft, handwritten document	the student will produce a final printed document containing the given revisions	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
			HINT: The teacher should create files and store them on the system for any of the following activities requiring a "given file." The student should also be supplied with a record layout and the name of the stored file.
	TIMESHARING SYSTEM		
D/IP-II-1	Using Terminals in a Timesharing System Logging On Systems Commands Sort Utilities	D/IP-II-1	Log-on using the given PPN and Password. Access and play a game. Learn how to: Take a SYSTAT, attach to a detached job, get a directory of the user's area, display the contents of a file, print the contents of a file, copy a file that is in the user's area, copy a file from another area, delete a file. HINT: Give student activities using these commands: SYS, ATT, DIR, TYPE, PRINT, COPY, DELETE. Sort a given file on a numeric field. Display or print the file. Sort a given file on an alphabetic field. Display or print the file.
D/IP-II-2	Creating and Revising Files on a Timesharing System Creating Files Editing Files Copying and Transferring Lines Justification	D/IP-II-2	Have the student create a file from given rough draft copy. HINT: The rough draft copy given the student should contain the following kinds of errors: omitted words, omitted lines, extra words, miscellaneous misspelled words, and one word repeatedly misspelled. Have the student edit the previously created file. Print a corrected copy. Using a preexisting text file, have the student transfer lines, copy lines, center lines, and print the test justified with designated margins.

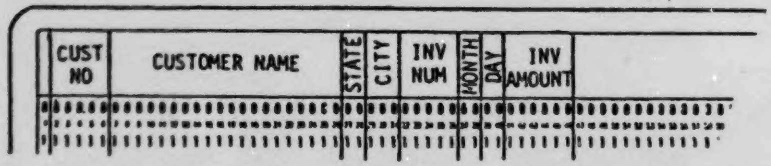
CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-II-3	File Inquiry and File Maintenance on a Timesharing System Locating Data Changing Records Deleting Records	D/IP-II-3	NOTE: The following activities will require purchased or user-written software and a teacher-created data file. Using a program that will inquire into a file, have the student locate information. For example: What is the name of salesman 590? How many months has he been employed? In what store and department does salesman 300 work? Using a program designed for file maintenance and a data file, have the student perform various activities. For example: Have Account 103 displayed. Correct a misspelled street address. Delete Accounts 90 and 102. Add a new account. Record sales and payments. Print a journal record. Print a deletion record.
	MICROCOMPUTERS		
D/IP-II-4	Initializing and Setting Up a Mailing List	D/IP-II-4	NOTE: The following activities for Sections 4, 5, and 6 are all related and cannot be completed in one period. Each student will need a diskette on which to create a mailing list and retain the work until the project is completed. A mailing list software package will be needed. Create a mailing list for the members of a club. Use "P" as the code for dues paid and "I" for members who are inactive. (Note: teacher should supply names, addresses, and indicate the code.)
D/IP-II-5	Updating and Sorting a Mailing List Using Search/Change Routine Sorting a Mailing List	D/IP-II-5	Print a copy of the newly created mailing list, proofread it, and make any necessary corrections. Update the mailing list. (Teacher should supply the list of corrections, additions, and deletions). Sort the list alphabetically.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-II-6	Printing Mailing Labels Entire List By Selection	D/IP-II-6	Sort the mailing list by ZIP Code and print address labels for all inactive members. (Paper may be substituted for labels to save expense.) Print mailing labels for all active "Paid" members.
D/IP-II-7	Using Word Processing Software Loading the Package (SCRIPSIT, APPLEWRITER, etc.) Basic Error Correction Methods Screen Status and Video Parameters Print Format Instructions Saving and/or Loading Documents Header and Footer Blocks Hyphenation Exchange, Insert and Delete Blocks Global Find, Replace, Delete	D/IP-II-7	NOTE: The following activities are designed for use with word processing software available for microcomputers such as SCRIPSIT for the TRS-80 and APPLEWRITER for the APPLE. Training tapes are available with some microcomputers. These can be used in conjunction with the activities. For a comprehensive treatment of word processing, see the WORD/INFORMATION PROCESSING section of this Curriculum Guide. Give a list of sentences with misspelled words and words to be deleted. Have students enter them into the memory with the errors and then make corrections. Give students a rough draft paragraph of material containing errors. Have students enter it into the memory and then make corrections, deletions, insertions, and format it both on the video display and for printed output. Give students a rough draft document containing errors. Have students enter it into the memory and then go back to exchange words and/or paragraphs, enter header blocks containing titles, and use horizontal formatting instructions—justifying, centering, flush left and flush right. Print the revised document.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Using Word Processing Software (Continued)		Using a document previously stored on disk or tape, have students load it; insert header block with a title, and a footer block including page numbering; provide for hyphenation; format, print, and save the document. Using the document previously saved, have the student insert a title page; exchange, insert, and delete blocks; change the header block to print on only odd pages; print and save. Using a document previously stored on disk or tape, have the student load it; make global changes such as replace, delete and find; use copy markers; and print the document.
●	Conservation of Energy and Materials	●	Conservation Suggestion: Terminals and mainframe computers should not be turned off—even over the weekends unless there is no air conditioning and the room temperature would be over 80 degrees. Microcomputers could be turned off overnight but not after each usage. They should be turned on in the morning and left on all day. When continuous forms are used, sections that have more than 6 sheets still attached are worth turning over and using the reverse side.

D/IP-II-1 OPERATING TERMINALS TEST

Below is a record layout of an accounts receivable file named ACCTRE.DAT that is stored in area (teacher supply PPN):



Sort the file so that it will be in customer number order, store it in the area in which you are running under the name CUSTUM.DAT, display the sorted file, print it, and then delete it.

NOTE: In order to use this test, teacher must have created data file ACCTRE.DAT containing records using the above layout.

D/IP-II-2 EDITING TEST

Using the rough draft text titled "Where Was I?", create a file named TEST.TXT. It purposely contains errors and omissions. Perform the following editing:

1. Insert the line "And I ordered two fat ones." following the line beginning "When God gave out legs."
2. Correct the misspelled words "sad, have, miss" and any others you may have discovered.
3. Using one command, correct the misspelled word "thought" throughout the text.
4. Print the revised copy fully justified using a 40-space line with the title centered.

WHERE WAS I?

WHEN GOD HAVE OUT BRAINS, I THOUGH HE SAID TRAINS
AND I MISSED MINE.
WHEN GOD GAVE OUT LOOKS, I THOUGH HE SAID HOOKS
AND I DIDN'T WANT ANY.
WHEN GOD GAVE OUT NOSES, I THOUGH HE SAID ROSES
AND I ASKED FOR A RED ONE.
WHEN GOD GAVE OUT LEGS, I THOUGH HE SAD KEGS
WHEN GOD GAVE OUT EARS, I THOUGH HE SAID BEERS
AND I ORDERED TWO LONG ONES.
WHEN GOD GAVE OUT CHINS, I THOUGH HE SAID GINS

AND I ORDERED A DOUBLE.
WHEN GOD HAVE OUT HEADS, I THOUGH HE SAID BEDS
AND I ASKED FOR A SOFT ONE.
GEE, AM I A MISS.

D/IP-II-3 FILE MAINTENANCE TEST

This test should be similar to the last suggested Activity D/IP-II-3.

D/IP-II-4 thru 7 TESTS

The tests for these tasks will be similar to the activities in the corresponding learning activities section.

COMPETENCY PROFILE
for
DATA/INFORMATION PROCESSING -- LEVEL II

Student Name______________________________ Starting Date____________________

Completion Date____________________

		DATE QUALIFIED	INITIALS
	TIMESHARING SYSTEMS		
D/IP-II-1	Using Terminals		
	Logging On		
	System Commands		
	Sort Utilities		
D/IP-II-2	Creating and Revising Files		
D/IP-II-3	File Inquiry		
	File Maintenance		
	MICROCOMPUTERS		
D/IP-II-4	Initializing and Setting Up a Mailing List		
D/IP-II-5	Updating and Sorting a Mailing List		
D/IP-II-6	Printing a Mailing List		
	Entire List		
	By Selection		
D/IP-II-7	Using Word Processing Software		
	Loading Package and Basic Error Correction		
	Video and Print Formats		
	Saving and/or Loading Documents		
	Header, Footer, and Hyphenation Blocks		
	Exchange, Insert, and Delete Blocks		
	Global Find, Replace, and Delete		

CERTIFICATE OF COMPETENCY AWARDED______________________________
Date Initials

DATA/INFORMATION PROCESSING - LEVEL III

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
D/IP-III-1	Given an elementary problem requiring the use of the statements REM, PRINT, READ, DATA, IF, and GOTO	the student will flowchart, write, and execute a program	with 100 percent accuracy.
D/IP-III-2	Given a problem requiring totals, comparing, and formatting	the student will plan a video display sheet, flowchart, write, and execute a program	with 100 percent accuracy.
D/IP-III-3	Given a situation for an interactive program	the student will write and execute the program	with 100 percent accuracy.
D/IP-III-4	Given a problem requiring minor, intermediate, and major totals	the student will plan a video display sheet, flowchart, write, and execute a program with the output group printed	with 100 percent accuracy.
D/IP-III-5	Given a problem requiring the user to store data in a table and sort it in numeric sequence	the student will plan a video display sheet, a flowchart, write and execute a program	with 100 percent accuracy.
D/IP-III-6	Given a situation requiring the user to create, maintain, and use a stored data file.	the student will plan a video display sheet, flowchart, write, and execute the necessary programs	with 100 percent accuracy.
D/IP-III-7	Given a situation requiring a bar graph	the student will plan a video display sheet, write, and execute a program	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
D/IP-III-1	Getting Started in BASIC BASIC Words: PRINT, NEW, RUN, LIST, REM, END, LET, READ, DATA, IF, GOTO, RESTORE Variable Names Mathematical Operators Order of Operations Flowcharts Headings READ and DATA Statements Loops with GOTO Use of Trailer to Indicate End of Data IF Statements Introduced	D/IP-III-1	From a list of variable names, the student will select those that are valid. Identify the function of the BASIC symbols for these mathematical operators: Have the student number the mathematical operators in the order they would be executed in various equations. To see if students understand the order of operations in an equation, have the student indicate the results of various equations. Write a program using REM and PRINT statements. Write a simple program adding two numbers together and displaying the results. (This can be expanded to other arithmetic calculations.) Identify the standard programming flowchart symbols. Write a program to read the length and width of a rectangle from a DATA statement and calculate the area. The output should contain column headings: LENGTH WIDTH AREA xxxx xxx xxxx Prepare a flowchart and write a program using the READ and DATA statements (include trailer to avoid O/D error) that will produce the following accounts receivable listing with headings and the new balance calculated: CUST. NO. OLD BALANCE PAYMENT NEW BALANCE xxx xxx.xx xxx.xx xxx.xx NOTE: Do not be concerned that the decimals do not align or all zeros print since the student will simply be using the comma to format the output.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

D/IP-III-2	Formatting, Totaling, and Comparing
	BASIC Words: CLS, TAB, PRINT USING, IF...THEN...ELSE
	Use of TAB Statement
	Formatting with the PRINT USING Statement
	String Variables Introduced
	Planning a Layout on the Video Display Sheet
	Single Totals
	Multiple Totals
	Relational Operators
	Comparing, Decisions, and Branching
		D/IP-III-2	NOTE: While EDIT and AUTO could be introduced at any time the student should be aware of these features by now. Some special activities may be used to give students practice using EDIT. If DISK and PRINTER are available, the LPRINT statement may be introduced for printed output and disk storage and retrieval concepts presented so the student can SAVE a program and LOAD it later.
			Identify the following relational operators:
			Given some conditions, have students convert them to proper BASIC statements. (For example: M is greater than 10. Z is less than or equal to A squared. X is not equal to Y. 3 times P is equal to Z times Q.)
			For each description, write an IF-THEN statement. (For example: If the value of A is less than or equal to 10, go to line 100.
			If A is less than 2*B, then increase the old value of T by 1.
			If X is greater than 2 times Y, then print the message X IS MORE THAN Y DOUBLED).
			To see how TAB works, have students type and RUN a program similar to the following:
			`10 A=3:B=5:C=A+B`
			`20 PRINT TAB (10); "A";TAB(20);"B";TAB(30);"C"`
			`30 PRINT TAB(10);A;TAB(20);B;TAB(30);C`
			Give tables to be set up and have students plan the format and design a video display sheet.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Formatting, Totaling, and Comparing (Continued)		Give several PRINT USING statements with amounts to be printed. Have students show the results. Have student give examples of strings and string variable names. Prepare a flowchart and write a program that will produce the following payroll with overtime. Overtime is time and a half for hours over 40. The pay rate for all is 4.20 per hour. Have output printed in the following format:

```
EMP. NO.   HOURS   REGULAR     OVERTIME     GROSS

   112      42      xxx.xx       xxx.xx     xxx.xx
   115      40      xxx.xx       xxx.xx     xxx.xx

       TOTALS     $x,xxx.xx   $x,xxx.xx $x,xxx.xx
```

D/IP-III-3	Responding to the Computer <u>BASIC Words:</u> INPUT Input Statements Interactive Programming	D/IP-III-3	Determine whether the following statements are valid or invalid. Identify the error in the invalid statements. (For example: 30 INPUT X 40 INPUT X Y Z 50 INPUT X INPUT Y 60 INPUT A,B,C,D,E,H, AND L). Determine how many entries after the question mark the computer would require if it encountered the following: (examples: 10 INPUT A 20 INPUT D,L,G,I 30 INPUT S,B,N). Write a program that will ask the price of an item and then calculate sales tax. The sales tax rate is 6% (.06). Have the computer tell you the amount of the tax and the net price of the item. (Net price is the price plus tax). Remember to use the PRINT USING statement for the output. Write a program asking the user to enter the feet and inches that are to be converted to centimeters. Using the formula Centimeters= total inches times 2.54, have the computer display "CENTIMETERS = ".

CODE | OUTLINE | CODE | LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

D/IP-III-4

Taking Subtotals
- BASIC Words: GOSUB, RETURN
- Control Breaks
- Minor, Intermediate, and Major Totals
- Subroutines
- Group vs. Detail Printing

D/IP-III-4

Give students a program containing one or more subroutines. To demonstrate their understanding of how the program branches from the main program to the subroutine and back again, list the line numbers in the order in which the computer executes them.

Prepare a flowchart and write a program requiring the use of minor totals and a final total.
NOTE: The data will have to be sequenced by the control field.

Prepare a flowchart and write a program requiring the use of minor, intermediate, and final totals. Have the output detail printed.

Describe the difference between group printing and detail printing. Rewrite the previous program to be group printed.

D/IP-III-5

Creating Loops and Using Tables
- <u>BASIC Words: FOR...NEXT, STEP, DIM</u>
- FOR/NEXT Loops Using Literals
- FOR/NEXT Loops Using Variables
- Creating Charts
- Nested FOR/NEXT Loops
- One Dimensional Arrays
  - Array Search
  - Accumulating Totals in Arrays
- Tables
- Sorting

D/IP-III-5

Play computer (ie., student does what the computer would do) and show the results of a program similar to the following:

```
10 FOR N = 2 TO 20 STEP 4
20 PRINT N;
30 NEXT N
```

Play computer and show the results of a program similar to the following:

```
10 FOR X = 1 TO 3
20 FOR Y = 1 TO 10 STEP 2:PRINT X*Y:NEXT Y
30 NEXT X
```

Write a program that will list the principal and interest compounded annually at 6% for ten years. Assume a deposit of $100 initially with nothing additional deposited during the ten years. Have the output displayed in table format.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Creating Loops and Using Tables (Continued)		Write the DIMENSION statement for a program that would set up an array named X to contain 12 data items, an array named H to contain 35 data items and an array named P to contain 28 data items. Write a routine to load the following data into an array named Y: 34, 62, 78, 23, 14, 54, 15, 32, 72, 60, 52, 14, 87. Write a program that will allow the user to enter temperatures for a week and load them into an array. Have the computer calculate the average temperature, list the high temperature, and the low temperature for the week. Execute your program and test it by entering seven temperatures. Assuming that an array called R has been loaded with 15 numbers, write a routine that would sort them in a descending sequence. Write a program that will load the following numbers into an array, display it in the original order, and then print out the sorted array: 34, 23, 10, 67, 56, 40, 18, 29, 81, 75, 69, 24, 17, 44.
D/IP-III-6	Creating, Maintaining, and Using Data Files BASIC Words: OPEN, CLOSE, INPUT#, LINE INPUT#, PRINT#, LSET, RSET, EOF, LOF Storing Data on Disk Accessing Stored Data Updating Data Files	D/IP-III-6	NOTE: The next three programs should be treated as one package. The student will need to store both programs and data on a diskette. Write a program that will allow the user to enter three fields of information: Salesman No., Salesman Name, and Amount Sold. This information is to create a data file which is stored on a diskette. Execute the program entering at least 20 records.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Creating, Maintaining, and Using Data Files (Continued)		Write a program to allow the user to access a record stored in the file previously created and have it displayed, make corrections, or delete it. Write a program that will load the data from the above file into an array which will be sorted in ascending sequence by salesman number. Print a report calculating the amount of commission received by each salesman. The commission in 15% with an additional 5% on sales above $5,000. The output should include a count of all salesmen whose sales exceed $5,000 and a final total of all commissions.
D/IP-III-7	Using Graphics BASIC Words: CLS, SET, RESET, POINT Boxing Reports Bar Graphs	D/IP-III-7	NOTE: GRAPHICS are not available on all computer systems. The methods also vary so the teacher must consult the reference manual for the individual systems. From a video display sheet containing horizontal and vertical lines of various length and width, have the student write program segments to draw these on the screen. Using one of the previous programs that produces a tabulated report, have the student rewrite the program with graphics so that the output will be boxed. Given some statistics, such as units produced in each department, prepare a video display sheet and write a program that will produce a bar graph.

DATA/INFORMATION PROCESSING CRITERION-REFERENCED TESTS
LEVEL III

D/IP-III-1 BEGINNING BASIC STATEMENTS TEST

Prepare a flowchart and write a program using READ and DATA statements (include trailer to avoid O/D error) that will produce the following payroll with headings. There is no overtime in this program.

```
EMP. NO.     HOURS     RATE      GROSS

  101         40       3.00      xxx.xx
  105         35       2.50      xxx.xx
  113         37       4.00      xxx.xx
```

D/IP-III-2 COMPARING AND TOTALING TEST

The ACE CAR RENTAL charges $17.95 per day, which includes the first 100 miles driven. If the car is driven more than 100 miles, the charge is $17.95 plus 18 cents per mile for each mile driven over 100.

Input:

Customer	Mileage	Days
Bill Lee	95	1
Carey Haber	125	2
Mary Clark	100	2
Joe Smyth	134	3

Output:

```
                ACE AUTO RENTAL REPORT

      Name              Days   Miles    Charge

 XXXXXXXXXXXXXX          XX     XXX     XXX.XX
 XXXXXXXXXXXXXX          XX     XXX     XXX.XX

           TOTAL CUSTOMERS         XX
           TOTAL CHARGES      XXXX.XX
```

D/IP-III-3 INTERACTING TEST

Write and execute an interactive program that will ask the user for a Fahrenheit temperature and convert it to Celsius. The conversion formula is: C = 5/9 * (F - 32). Make provisions for converting as many temperatures as the user desires and also incorrect user responses.

D/IP-III-4 SUBTOTALS TEST

Write a program that will print the total sales for each department (minor); the total sales for each store (intermediate) and a final total at the end. The report is to be group printed.

Input:

Store	Dept.	Sales
15	6	147.50
15	6	230.40
15	6	150.49
15	7	300.40
15	7	200.75
17	6	131.29
17	6	124.50
17	7	300.41
17	7	174.50

Output:

```
Store          Dept.             Sales

 xx             xx            $x,xxx.xx
 xx             xx            $x,xxx.xx

 TOTAL FOR STORE XX          $xx,xxx.xx

 GRAND TOTAL                 $xx,xxx.xx
```

D/IP-III-5 FOR/NEXT AND ARRAYS TEST

Write a program that will allow the user to key in test scores with an INPUT statement. The scores (an indefinite number but never more than 25) should be loaded into an array, the array printed in the original order (horizontally), the array sorted and printed, and an average score calculated and the average printed.

TEST SCORES: 98, 100, 88, 92, 78, 94, 85, 82, 87
79, 96, 90, 88, 91

D/IP-III-6 USING DATA FILES TEST

This test should be similar to the last suggested activity in D/IP-III-6.

D/IP-III-7 GRAPHICS TEST

Prepare a video display and write a program to create a bar graph using the following input:

Dept. Code	Sales
A	350
B	500
C	400
D	475
E	340

COMPETENCY PROFILE
for
DATA/INFORMATION PROCESSING -- LEVEL III

Student Name ______________________________ Starting Date ____________________

Completion Date ____________________

	PROGRAMMING IN BASIC	DATE QUALIFIED	INITIALS
D/IP-III-1	Using REM, PRINT, READ, DATA, IF, and GOTO Statements.		
D/IP-III-2	Solving a Problem Requiring Totals, Comparing, and Formatting.		
D/IP-III-3	Interactive Programming (INPUT Statements)		
D/IP-III-4	Minor, Intermediate, and Major Totals.		
	Group Printed		
	Detail Printed		
D/IP-III-5	Storing Data in an Array		
	Sorting Data from an Array		
D/IP-III-6	Creating Data Files.		
	Maintaining Data Files		
	Using Stored Data Files		
D/IP-III-7	Using GRAPHICS		
	Boxed Reports		
	Bar Graphs.		

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

DATA/INFORMATION PROCESSING

Completion Date ______________ School ______________________________

Instructor ______________________________

INTRODUCTION (Level I)

________ Computers--History, Applications, and Careers

________ Function of Electronic Computers

________ Data Representation

________ Input/Output and Storage

________ Program Development and Languages

________ Data Communications

________ Data Base and Distributed Data Processing

TIMESHARING SYSTEMS (Level II)

________ Use of Terminals
  Logging On
  System Commands
  Sort Utility

________ Creating and Revising Files

________ File Inquiry

________ File Maintenance

MICROCOMPUTERS (Level II)

________ Initializing and Setting Up a Business Application Software Package

________ Updating and Sorting a Business Application Software Package

________ Printing a Business Application Software Package

________ Using Word Processing Software

PROGRAMMING IN BASIC (Level III)

________ Use of Beginning BASIC Commands

________ Formatting, Totaling, and Comparing

________ Responding to the Computer

________ Taking Subtotals

________ Creating Loops and Using Tables

________ Creating, Maintaining, and Using Data Files

________ Using GRAPHICS

CONSERVATION OF MATERIALS AND ENERGY

BACKGROUND INFORMATION E-2

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE E-3

- Personal E-3
- Low-Cost Improvements E-6
- Major Improvements E-8
- Miscellaneous E-9

LEARNING ACTIVITIES AND TEACHING SUGGESTIONS E-9

CONSERVATION OF MATERIALS AND ENERGY

INTRODUCTION

For many years Americans have taken for granted the abundance of natural resources and the relatively low cost of materials and energy without having to think of conservation. Now that society has become aware of how vulnerable we are to a shortage of natural resources and to an inflationary spiral in cost of living, it is important that business educators prepare students to be consumers and workers who are aware of and concerned for conservation in the classroom and in the business world.

It is incumbent on the citizens of tomorrow to plan and build for energy efficiency and resource conservation.

BACKGROUND INFORMATION

The building envelope is composed of all the walls, windows, doors, etc. These interface between the outdoor and indoor environments. This building envelope is the key to saving energy. Obviously, as new buildings are built, they should be engineered to be energy efficient with proper insulation, ventilating, screening, lighting fixtures, etc. However, the older buildings may not be energy efficient and have to be retrofitted (brought up to energy efficient standards).

Buildings are responsible for using about one-third of all the energy in the United States. The biggest costs in operating a building are the heating, cooling, and heating of water. Although only two percent of total energy consumed is for lighting, 24 percent of the electricity sold is for lighting and can be very costly for some businesses.

Every businessperson concerned about energy cost has to be aware of three factors that influence the utility bill. General service, commericial and industrial rates are based on:

Usage cost (KWH) - cost of electricity consumed
Capacity cost (KW) - cost of providing maximum electrical demand
Service cost - amortized cost to provide service

An example of energy consumption (kilowatt hours) is ten 100-watt bulbs turned on for one hour equals one kilowatt hour. When the 10 bulbs are turned off you are no longer using energy (KWH).

BACKGROUND INFORMATION (Continued)

Electric demand is a term that refers to the generating capacity required to serve a given load. Its unit measure is kilowatt (KW). Assume that the 100-watt lamp burns for only 10 hours. The lamp will consume 1,000 watt hours or one kilowatt hour of electricity. A 1,000-watt lamp that is lighted for one hour will also consume one kilowatt hour of electricity. The consumption of electricity is identical for both examples, but the rate of electircity use (demand) is not. Ten times more power is needed to operate the 1,000-watt lamp. Although both lamps consume the same amount of electricity, the utility company has to supply electricity to the user of the 1,000-watt lamp at a rate which is 10 times greater. The investment to provide for the extra electric capacity is much greater, thus the user is billed through an electric demand charge.

The demand (kilowatt) meter measures electric capacity over a fifteen-minute time period. The metered (measured) demand over the fifteen-minute interval is not the maximum rate of electricity used; it is the average of the power used over the fifteen-minute demand time interval.

The cost of building plants to handle the electric demand is absorbed by the shareholders of the utility company. However, the cost of the interest on the money to build the plants is shared by the customers through the electricity rates.

This unit may be used as a separate teaching unit in the classroom or integrated throughout the year as the teacher sees fit.

NOTE: The symbol, ●, is used throughout this curriculum guide denoting tips on conserving materials and energy in the various program areas.

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

There are numerous approaches to conserving energy and materials in both the classroom and the office. Many of the suggestions listed below require only action on an individual's part and do not entail any extra expense. In many instances, it is only a matter of changing some bad habits in order to save energy and materials.

Some of the suggestions listed below may cost only a few pennies while others may appear to be quite costly.

Personal. These are methods which each individual can employ in the classroom and/or in the office:

Know office policies and follow them.

Set thermostats at 78° in the cooling season and 68° in the heating season. Federal mandate is 65° in all public buildings.

Do not change thermostat setting.

CONSERVATION OF MATERIALS AND ENERGY

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

Personal (Continued)

Don't open windows when air conditioning or heat is on.

Open draperies and blinds in daytime during the winter months for free solar energy. Close them at night to help keep cold out and heat in.

Leave draperies closed on summer days to block sun's rays.

Use reflective sun screens or film on your windows.

Arrange to do activities in sunny parts of the building during cold weather whenever possible.

Turn heat/air conditioning down at night or when you are gone for more than several hours.

Don't block air vents for heater or air conditioner.

For groups, utilize body heat combined with control of the thermostat.

Utilize lights to generate heat.

Turn electric heater off at circuit breaker after the heating season to make sure it is really off.

Turn gas pilot light off during the summer.

DO NOT use small space heaters in public buildings to supplement central heating. This is a federal mandate which carries a $10,000 fine for noncompliance.

Schedule activities during hours when building is in use; just use light, cooling, or heating for specific areas for after hours meetings, etc.

Turn off electrical equipment when finished using. (Exceptions to this might be computers, word processors, etc. check manufacturer's recommendation)

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

Personal (Continued).

Tilt venetian blinds at angle to reflect light and heat instead of allowing them to enter a room.

Set water heater thermostat lower.

Report repairs immediately—flickering lights, dirty fixtures, dripping faucet, etc.

Don't leave radio on when not listening to it.

Use daylight in office or classroom if possible.

Reduce lighting level—especially in closets, halls, lobbies, restrooms, etc.

Replace incandescent bulbs with fluorescent ones where practical. (If removing fluorescent tubes, be sure to disconnect ballasts.)

Use dimmer switches where possible.

Use directional lamp for reading, etc., instead of lighting a whole room.

Use task lights in office instead of lighting whole office.

Turn off lights when not in use—fluorescent and incandescent.

Clean all light tubes regularly.

Replace all yellowed lenses on light fixtures.

Make sure exterior lights are on only when absolutely necessary.

Leave only security lights on in buildings at night.

Recycle nonsensitive content paper for scratch paper.

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

Personal (Continued).

Recycle outdated forms for scratch paper.

Set copier to proper size.

Make fewer copies.

Use both sides of paper when possible.

Trim distribution lists.

Request large print runs to be put on recycled paper.

Type carbon copy of a reply to letter on reverse side of letter.

Recycle aluminum can, newspapers, etc.

Stop unnecessary computer runs if possible.

Use microfilm, microfiche if possible for storage of document.

Use public transportation, car pool, or bicycle, if feasible.

Low-Cost Improvements. These improvements which might be made to improve energy efficiency in the classroom and/or office for a relatively low cost.

Caulk or weatherstrip doors and windows.

Make sure windows and doors close automatically during heating and cooling season.

Install dual pane windows where possible.

Put up storm windows to keep in winter warmth.

CONSERVATION OF MATERIALS AND ENERGY

WAYS TO CONSERVE ENERGY AND MATERIAL IN THE CLASSROOM AND/OR OFFICE

Low-Cost Improvements (Continued).

Drape, shade, or screen windows.

Replace broken windows and mend any cracks in building envelope.

Paint walls and ceiling a light color.

Paint roof a reflective color in warmer climatological areas.

Keep air conditioner filter clean.

Provide for shading around the air conditioning unit.

Install dimmer switches where possible.

Make sure lampshades fit and are translucent.

Replace incandescent lights with high-efficiency fluorescent tubes where possible.

Check your thermostat for accuracy and adjust or replace it if necessary.

Install automatic timers.

Install master switch in classroom to make sure all machines are off when not in use.

Install hot air blowers in restrooms.

Ventilate closed in areas.

Block off all exhaust fans in restrooms.

Insulate hot water pipes.

Wrap water heater in an insulated "blanket."

CONSERVATION OF MATERIALS AND ENERGY

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

Low-Cost Improvements (Continued).

Use microwave oven in employee lunch room to heat foods.

"Fit" refrigerator size to employee needs.

Keep refrigerator at 40°.

Keep refrigerator coil clean.

Check tightness of door seals to make sure the refrigerator's cold air is not lost.

Plant deciduous trees to add shade in summer and to let sun through in the winter.

Add awnings, overhangs, etc. for shade in summer.

Have management attend seminars on energy conservation available through Arizona Public Service.
(Energy Management Action Course)

Have Arizona Public Service visit the office for a Computerized Commercial Energy Analysis.

Major Improvements. These are improvements which might be made to a classroom and/or office which would involve a major expense; however, the energy savings will more than pay the cost of the improvement over a period of time.

Install additional ceiling insulation if necessary.

Install thermal ceiling panels.

Wrap all heating and cooling ductwork with insulation.

Waterproof building to prevent air entry.

Consider a heat pump.

Utilize waste heat from air conditioning and regrigeration units if possible.

Use solar equipment where feasible.

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

Miscellaneous.

Stagger working hours.

Help the air conditioner by doing moisture-producing chores in the early morning or at night when it's cool. (i.e. mopping floors, watering plants, etc.)

Use telephones, meetings, bulletin boards, etc. to help conserve paper.

Don't require workers to travel frequently.

LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Guest speakers on energy used in classroom.

Students prepare presentation on conservation for dissemination in the community.

Students speak on conservation in competitive events.

Students brainstorm ideas on conservation.

Students shadow utility company representative when home energy evaluation is made in that student's home.

Arizona Public Service will bring their Texas Instrument computer used in evaluating energy in businesses for demonstration. The computer evaluates and prints information on the specific business's energy usage.

Arizona Public Service will bring computer attachment for phone (used for measuring home energy consumption) and demonstrate in classroom if teacher has phone in room.

Trees and other landscaping may be presented as gifts from the youth organization to the school to be placed in strategic places to assist in energy conservation.

Students can figure cost of operating machines in classroom and/or business department. Watts will show on machine or in machine manual. If it is not shown, the volts and amps will be shown. Volts X amps = watts on machine. Watts of the machine X hours run ÷ 1000 X 5 1/2 cents = cost to run machine per hour.

WAYS TO CONSERVE ENERGY AND MATERIALS IN THE CLASSROOM AND/OR OFFICE

LEARNING ACTIVITIES AND TEACHING SUGGESTIONS (Continued)

The Energy Consumer's Guide published by Arizona Public Service, may be used as a handout.

Students may help family set a goal of lowering utility bill for a month. Bring utility bill before and after the goals are set. Billing by Arizona Public Service is explained on page 19, The Energy Consumer's Guide.

Students may conduct a paper drive or aluminum can drive to assist in conservation and make money at the same time for their youth organization.

Students may get permission to put reminders on light switches in school to assist in conservation as a service project for the youth organization.

Films and presentations on energy conservation are available from utility companies.

Students should be made aware of importance of paper conservation.

FUTURE BUSINESS LEADERS OF AMERICA/PHI BETA LAMBDA

WHAT is FBLA/PBL?

The Arizona State sanctioned vocational student organization. FBLA/PBL is a co-curricular organization and an integral part of the business curriculum.

WHO can be in FBLA/PBL?

Membership is available to every student participating in a business or office program. FBLA is designed for high school level students, and PBL is designed for post-secondary students.

WHY have a chapter?

The student can participate in a student organization which is recognized by employers and other community leaders as part of an educational program of occupational preparation.

The teacher can encourage individual student motivation and maturation through competition with others or, more importantly, with the student's own past performance.

The school may provide a more comprehensive educational program of occupational preparation.

The business people and other community members have an opportunity to understand the objectives of the business education department as well as the total school program.

The parents are appreciative that their sons/daughters are actively involved in a worthwhile organization.

WHERE do I get more information?

Contact the State Supervisor of Business and Office Education
1535 West Jefferson
Phoenix, AZ 85007
Phone: 255-5350 or 1-800-352-4558 (Hotline)

HOW do I start a chapter?

Involve a nucleus of enthusiastic students.
Obtain local school approval.
Write a constitution.
Pay dues and receive charter.

FUTURE BUSINESS LEADERS OF AMERICA/PHI BETA LAMBDA

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ADVANTAGES OF HAVING A CHAPTER

Everyone can benefit from association with FBLA/PBL. Some of the advantages for the persons involved are:

FBLA/PBL Members:

Have an opportunity to identify with and to be part of a peer group.

Have an opportunity to participate in activities providing learning situations which can improve knowledge, increase skills, and shape attitudes that will advance the student's business career.

Have an opportunity to gain understanding of the business world and what will be expected of them in the business world.

Have an opportunity to gain self-confidence and receive recognition.

Begin to understand the requirements and responsibilities of "leadership" and "followership."

Have the prestige of participating in a group which is recognized at local, state, and national levels.

Receive a national publication, Tomorrow's Business Leader.

The teacher/advisor:

Becomes better acquainted with the student/member within a student-centered setting.

Has a method of instruction that can be used to maximize learning opportunities which will complement, enrich, and strengthen the program of business and office education.

Has a means of providing feedback on the educational program to the school and community.

May increase enrollment in class through the use of the organization as a motivational tool.

Has a superior way to assist in the growth of students.

The school:

Has an excellent public relations method to inform the public about the school and its business and office education program.

Has a means of getting the community involved in the educational program of the school through use of businesspersons and parents as guest speakers, judges, sponsors, advisory committee members, etc.

The business people and other community members:

May benefit from the chapter's community project.

May have the opportunity to bring specialized knowledge into the schools as speakers or consultants and get to know the students.

Benefits from better-qualified workers for the future as the students learn through the organization.

The parents:

Have the opportunity of being involved in school activities and having a better understanding of the educational program by serving as sponsors and/or assisting with the club activities.

Have the pleasure of seeing their son/daughters mature and receive recognition through participating in the organization.

SOURCES OF ADDITIONAL INFORMATION

There is an advisors' meeting which is usually held in Phoenix in September. Contact the State Supervisor of Business and Office Education for details. This meeting can be very helpful when starting a chapter.

Active members and state officers of FBLA/PBL are available as speakers to explain more about FBLA/PBL. Contact the State Supervisor of Business and Office Education for further information.

A slide presentation with an audio cassette is available from the State Supervisor of Business and Office Education.

SOURCES (Continued)

After dues have been paid, you will receive the official Handbook for FBLA/PBL which is a valuable source of information on the background of FBLA/PBL and competitive events.

Brochures and other aids are available from the National Office:
Future Business Leaders of America/Phi Beta Lambda
P.O. Box 1741-Dulles
Washington, DC 20041

STARTING YOUR CHAPTER

After you have involved a nucleus of enthusiastic students and obtained local school approval, you will want to write a constitution for your local chapter. See Supplement 1, FBLA/PBL pages 14-16 for your use in writing your club's constitution (local chapter bylaws).

The constitution of an organization sets out the "ground rules" of operation. The constitution serves the organization and its members, not vice versa. Normally, the following series of steps are used in establishing a constitution.

1. Constitutional Committee is appointed
2. Constitution is developed
3. Proposed constitution is presented to the membership
4. Membership ratifies the constitution
5. Adopted constitution is printed and disseminated

PAYING DUES

Dues are payable in October or March. The deadlines are released by the State Supervisor of Business and Office Education each year. Dues at this time are $3.50 per year; $2.50 for national, and $1.00 for state. If you wish to charge local dues, you may do so.

RECRUITING MEMBERS

One important facet of a successful club is recruiting new members. Remember—every business and office education student is a potential member! Some ideas for recruiting are:

Automatic membership in vocational classes
    (Should be put in writing on enrollment materials)

Sponsors talk with individual students

Competition between classes on percentage of students becoming members

RECRUITING (Continued)

Tomorrow's Business Leader as a resource.
Officers speak in business classes.
School announcements.
Posters on campus and in classroom.
Regional and state officers as resource speakers
Recruiting party.
Slide presentation from State Supervisor of Business and Office Education.
Flyers to give business students. (You may want to attach candy or some other small item.)

ORGANIZING A CHAPTER (alternative methods)

A single charter is issued to each chapter in a secondary or postsecondary school or college, regardless of whether it functions as a general chapter or as a general chapter with sub-chapters.

General Chapter - A school may opt to have one general chapter consisting of all interested students from any business class. Chapter officers, elected by the entire chapter, would include a president, vice president, secretary, treasurer, historian, reporter, and possibly a parliamentarian.

Sub-Chapters - Each participating business class may form a sub-chapter of its own—electing a president, secretary, and treasurer. These sub-chapter officers conduct the business meetings in their respective classes. Chapter officers are then elected by the entire chapter. These chapter officers may plan agendas for the sub-chapters, keep a master record of all finances, collect all sub-chapter minutes and prepare master records, carry on chapter correspondence, prepare the chapter activities report, and coordinate the activities of the sub-chapters.

ELECTING OFFICERS

Each officer has well-defined responsibilities as outlined in the Arizona State Officers Handbook. The importance of proper selection and training of officers is extremely important. One recommended process for officer election includes:

Use a nominating committee. An advisor should not dominate the organization. A nominating committee can talk with possible candidates and insure that members with potential for leadership run for office.

Use a written application for office. Officers will exert more effort if they seek an office rather than fall into it. (see Supplement 2, FBLA/PBL page 18).

Have at least two candidates for each office. This is advisable if at all possible. Nominations may be accepted from the floor if the nominee has submitted an application.

Allow the defeated candidates to be nominated for another office. Nominations will come from the floor.

Use a written ballot. The members will have an experience in true democracy in using a written ballot. A majority vote is required for election.

CONDUCTING CEREMONIES AND SERVICES

Ceremonies and services for installing the chapter, installing new officers, and induction of new members can be very meaningful to the members of the chapter. These can instill a spirit of pride and enthusiasm for the organization. The official FBLA/PBL Handbook contains procedures for these ceremonies.

CONDUCTING MEETINGS

Meetings may be scheduled during regular school activity periods, during regular class periods once or twice a month as necessary, during the evening, or at any time convenient to the majority. Remember—because FBLA/PBL is a sanctioned co-curricular organization, meetings may be held during class time.

Well-planned, regularly held chapter meetings are necessary for maintaining member interest, insuring regular attendance, and for promoting the general welfare of the group. Meetings are held to conduct business or present a specific program—never just for the sake of meeting.

ESSENTIALS OF A GOOD MEETING

Planned in advance and agenda prepared

Opened and closed on time

Move along with pep and enthusiasm so members will not become bored and time will not be wasted

Parliamentary procedures used

Committee reports well prepared

Officers know duties and responsibilities

Interest of all members held throughout the meeting

Every member feels wanted and needed; give recognition where deserved

Promote enthusiasm

SUGGESTED ORDER OF BUSINESS

Call meeting to order
Secretary's report
Treasurer's report
Committee reports
Old business
New business
Adjourn the meeting

PLANNING A PROGRAM OF WORK

A Program of Work is a tool used to help manage the activities of an organization. It is a planning device which allows an organization to focus on planned activities in respect to the goals of the organization. Prioritization of events, scheduling of events, and assignment of individual responsibilities are some benefits of a good Program of Work.

The Program of Work is designed to provide educational experiences of a "co-curricular" nature rather than those of the "extra-curricular" variety. Activities or experiences may be classified as PROFESSIONAL, CIVIC, SERVICE, SOCIAL, and FINANCIAL. See Supplement 3, FBLA/PBL page 19. See Supplement 4, FBLA/PBL page 19, for sample Program of Work Calendar

Professional activities are those that seek to develop or improve the professional status of the individual. The professional facet of the Program of Work would include such activities as:

Learning about Free Enterprise
Ceremonies and services
Guest speakers
Panel discussions
Business-related films
Field trips
Special-recognition banquet
Alumni follow-up
Project participation
Meetings

PLANNING A PROGRAM OF WORK (Continued)

Local, State, Regional, and National Conferences are also considered professional activities. Students may participate in workshops and/or competition at these conferences.

Workshops are conducted at conferences in such areas as career preparation, human relations, and self-improvement.

Competitive events illustrate the scope of interests and activities of FBLA/PBL. The categories under which these fall are: individual, team, and chapter events. Competition can serve to increase the students' skill levels in a variety of areas, and it also provides a sense of self-worth and satisfaction for the students. Guidelines for these events can be found in the official FBLA/PBL Handbook.

Civic activities are those which make a contribution to the community. Such activities offer members the opportunity to: become involved in community life, provide a service to the community, become a responsible citizen, meet and work with influential business and community leaders, and learn steps necessary to see a project through. The civic facet of the Program of Work would include such activities as:

- Benefits for
  - March of Dimes
  - Heart Fund
  - Red Cross
  - United Fund
- Floats in parades
- Booths and exhibits
- Assistance in community elections
- Business or consumer related projects
- Clean-up drives
- Citizenship campaigns
- Programs for Civic and Service Organizations explaining FBLA/PBL goals and the Free Enterprise System

Service activities are those that provide service to others with no regard for recognition other than the satisfaction derived from helping those in need. The service facet of the Program of Work would include such activities as:

- Adopting a "chapter grandmother"
- Preparing Thanksgiving or Christmas baskets for needy families
- Volunteering to work with handicapped
- Making tape recordings for the blind
- Sponsoring a foster child
- Christmas caroling
- Participating in social agency work

Social activities provide recreation and fun for the members. The social facet of the Program of Work would include such activities as:

- Skating parties
- Ice cream socials
- Cookouts
- Potluck dinners
- Christmas gift exchanges
- Hayrides
- Pizza parties
- Sports activities with other clubs

PLANNING A PROGRAM OF WORK (Continued)

Financial activities are those which help to provide funds to support the activities of a local chapter. Fund-raising events help students practice efficient money management, a goal of FBLA/PBL. The financial facet of the Program of Work would include such activities as:

Bake sales and candy sales
Carnival or fair
Concession stands
Dinners/breakfasts
Contributions from service organizations
  and business people.
Football/basketball programs (sales and printing)
Jog-a-thons, Rock-a-thons, etc.
Candy-grams
Flower sales at Valentine's Day or Homecoming

FBLA/PBL PUBLICATIONS

The following publications will be received throughout the year:

FBLA/PBL Handbook is the official guide published by the national office for instructors, administrators, advisors, officers, members and students. It is an invaluable guide with answers to all your questions about the association. Each local chapter receives a copy when chartered--and revisions as they are published. Additional copies are available through the national office. This guide provides information such as:

Background of the organization
Organizational structure
Tips for advisors
Suggestions for meetings
Parliamentary procedures
Advisory Councils
Local chapter activities
Chapter publications
Leadership conferences
Competitive event guidelines
Ceremonies and services
Constitution and Bylaws
Code of Ethics, Pledge, Creed
  Official Emblems and Insignias

Chapter Activities Guide is mailed to each chapter from the national office at the beginning of the year to help members plan for the new year. This guide provides such useful information as:

Membership reporting forms
Monthly activities calendar
*Nationally approved suppliers

*Note: Approved suppliers provide a royalty return of 3 percent to both the national and state treasuries.

FBLA/PBL PUBLICATIONS (Continued)

Tomorrow's Business Leader is the official student magazine published by the national office three times a year. Each dues-paying member receives a copy. This magazine features:

- Local chapter activities
- Career and business-related articles
- Officer news
- Tips for chapter program implementation

Hotline, the national newsletter for advisors, officers, and professionals, is published four times a year. This publication contains articles on:

- New FBLA/PBL materials and up-coming events
- Business items affecting members and advisors
- Successful programs and activities of advisors, officers, state chapters, alumni, and business

National Leadership Conference Guide is mailed to all chapters in the spring to help members and advisors prepare for the National Leadership Conference (NLC). It includes:

- NLC forms
- Schedule of events
- General information

Directory of State Officers contains a list of state officers for FBLA/PBL in the other states. It also includes:

- A current list of
    - State and National Officers
    - Board of Directors
    - National Advisory Council
    - State Committee
- Fundraising suppliers
- Emblem suppliers

Project Packets are sent to chapter advisors and members to help them get projects under way. Project packets might include:

- Promotional posters
- Idea leaflets
- Report forms
- Materials explaining special projects

FBLA/PBL PUBLICATIONS (Continued)

FBLA/PBL Flip Chart is a professional tool which your students can take with them when visiting members of your local business community. With the help of the Flip Chart, your students can tell business people what FBLA/PBL stands for and how they can get help from FBLA/PBL. It may be purchased from the national office for a nominal fee.

Miscellaneous The state and national offices also provide a number of brochures and booklets which are useful for recruiting members and informing administrators, parents, and the business community about FBLA/PBL.

Guide to Integrating FBLA into the Curriculum provides activities to help business educators integrate FBLA/PBL into the classroom. These materials may be purchased from the national office and include innovative ideas for integrating activities in five major areas:

Basic Business
Shorthand
Accounting
Typing
Office Procedures

Western Regional Newsletter is currently mailed to all chapters from the Western Regional Vice President. It provides a means of communication for the members of the Western Region of which Arizona is a part.

EVALUATING YOUR CHAPTER

The process of evaluation is a constant one. In order to accomplish goals, an honest evaluation must be performed at least once a year. It is even better to consider a mid-year evaluation.

A committee of students might work cooperatively with the advisor in conducting an evaluation of the total program. This group could prepare a written report for presentation to the entire organization. They might also submit the final appraisal to school administrators. If someone outside your organization is familiar with your program, it would be of value to have them assist you in evaluation.

The following areas might be considered for evaluation:

Program of work (See Supplement 5, FBLA/PBL page 20)
Student Organization Activities (See Supplement 6, FBLA/PBL page 21)
Meetings (See Supplement 7, FBLA/PBL page 22)
Leadership Development
Related Classroom Instructional Curriculum
Public Relations

ROLE OF THE ADVISOR

One vital factor in the success of an FBLA/PBL chapter is the advisor. Student members come and go, but the advisor provides the continuity and "know how" for the organization. Being an advisor can be demanding, but the advisor who retains a deep concern for students will receive rich rewards for the time and effort put forth.

The ability of the advisor to guide the organization in a manner that will keep it student-centered and student-directed is very important. The advisor should display integrity, perseverence, initiative, and enthusiasm.

The following suggestions may help the advisor:

Permit the membership to make decisions in a democratic way within the framework of regulations approved by the school. Contribute, but do not control.

Involve all members. The activities should encourage the members to be involved in ways that will bring satisfaction and pride.

Enthusiasm on the part of the advisor for the projects is essential.

Encourage the feeling that everyone's ideas have worth and are wanted and needed. Maintain an impartial attitude.

Encourage businesslike actions in all activities sponsored by the organization.

Encourage participation in local, state, and national conferences.

Assist in developing a program of work and hold to the plan.

Use aids to integrate FBLA/PBL into the classroom as a teaching tool.

Additional suggestions for the advisor may be found in the official FBLA/PBL Handbook.

SUGGESTED FBLA LOCAL CHAPTER BYLAWS

This "Suggested FBLA Local Chapter Bylaws," revised April 1, 1979, is intended as a guide. Local Chapter Bylaws shall not be inconsistent with state or national constitutions or Bylaws or with the FBLA-PBL, Inc. charter. Those provisions in the Local Chapter Bylaws which derive from these higher authorities are not amendable at the local level.

FUTURE BUSINESS LEADERS OF AMERICA

__________ Chapter

BYLAWS

Article I. Name

The name of this organization shall be the ____________________ Chapter of the Future Business Leaders of America.

Article II. Purpose

Section 1. The purpose of this FBLA Chapter is to provide as an integral part of the instructional program additional opportunities for secondary students (grades 7-12) in business and office education to develop vocational and career supportive competencies and to promote civic and personal responsibilities.

Section 2. The specific goals of FBLA are to:

Develop competent, aggressive business leadership
Strengthen the confidence of students in themselves and their work
Create more interest in and understanding of American business enterprise
Encourage members in the development of individual projects which contribute to the improvement of home, business, and community
Develop character, prepare for useful citizenship, and foster patriotism
Encourage and practice efficient money management
Encourage scholarship and promote school loyalty
Assist students in the establishment of occupational goals
Facilitate the transition from school to work.

Article III. Membership

Section 1. Membership shall consist of these classes of members:

Active Members shall be secondary students who become members while enrolled in business and office education, at ____________________, who accept the purpose of FBLA, subscribe to its creed, demonstrate willingness to contribute to good school-community relations, and possess qualities for employment. Active members shall pay dues as established by FBLA and may participate in national events, in accordance with the guidelines of the National Awards Program, serve as voting delegates to the National Leadership Conference, hold national office and otherwise represent their state and local chapters as approved by their respective state or local advisers.

Alumni Members shall be persons who have terminated their active in-school membership and who continue to comply with the rules and policies of FBLA-PBL. Former members of FBLA-PBL shall be eligible for membership in the Alumni Division and shall become members upon payment of dues. Students enrolled in undergraduate programs in a school with an active FBLA or PBL chapter shall not be eligible for membership in the Alumni Division. Graduate students who are former members of FBLA-PBL shall be eligible for membership provided that they do not hold membership in another division.

Professional Members shall be persons associated with or participating in the professional development of FBLA as approved by state chapters. Such members may include local and state chapter advisers, business teachers, business teacher educators, state supervisors of business and office education, employers or supervisors of cooperative work-training students, advisory council members, businesspersons, and other persons contributing to the growth and development of FBLA. Professional members shall pay dues as established by FBLA, but shall not participate in events, serve as voting delegates, or hold office.

Honorary Life Members may be elected to a local chapter by a majority vote. They shall be persons who are assisting in the advancement of business and office education and/or who are rendering outstanding service to the Chapter. Honorary Life Members shall not vote or hold office and shall not be required to pay dues.

Section 2. Members shall hold membership in their state and national chapters. Individual members shall be recognized only through a state chapter of FBLA except that, in the case where there is no state chapter, the member shall be recognized by the national office.

Article IV. Dues and Finance

Section 1. The membership dues in the Future Business Leaders of America shall be $________ a year, of which $________ shall be remitted to the FBLA National Office in payment of the national dues by November 1 and $________ to the FBLA state chapter in payment of state dues.

Section 2. The fiscal year of FBLA shall be July 1 through June 30.

Section 3. An audit shall be made annually by the auditing committee which shall report at the annual meeting.

Article V. Officers and Elections

Section 1 Officers of the Chapter shall be: president, vice-president, secretary, treasurer, reporter, historian, and parliamentarian. These officers with the adviser as ex-officio member shall constitute the Executive Committee. Officers shall be elected at the annual meeting and shall hold office for a term of one year or until their successors are elected. Officers shall assume their duties at the close of the meeting at which they were elected.

Section 2. The Chapter shall have an Adviser who shall be a faculty member from the business department. This chapter may have as many special-emphasis groups under the chapter charter as it deems necessary to meet the interests of all students and shall assume full responsibility for coordinating the program for these interest groups.

Section 3. The Chapter shall have an Advisory Council which shall consist of two or more honorary life members, the Chapter Adviser, and other area business leaders.

Article VI. Duties of Officers

Section 1 *The President* shall (a) preside over all meetings of the Chapter, (b) appoint all committees and serve as an ex-officio member of these committees, (c) and promote the growth and development of FBLA.

Section 2. *The Vice-President* shall (a) preside in the absence of the president, (b) and assist the president in other ways as appropriate.

Section 3. *The Secretary* shall (a) keep an accurate record of the chapter and executive committee meetings, (b) and submit the required reports to the State Chapter and the National Office.

Section 4. *The Treasurer* shall (a) act as custodian of the funds of the organization, collect dues, and give financial reports, (b) and send the membership list with dues to the State and National Offices.

Section 5. *The Historian* shall (a) maintain records of the Chapter, including an annual report of its activities, awards, and publicity.

Section 6. *The Parliamentarian* shall (a) serve in any capacity as directed by the president, (b) and advise the president or presiding officer on points of parliamentary procedure.

Section 7. *The Reporter* shall (a) act as public relations officer for the Chapter, (b) see that new stories and photographs are delivered to the school paper, the local newspaper, the state news bulletin, and the national *Tomorrow's Business Leader,* (c) and cooperate with the school official concerning assembly, radio, and television programs.

These officers shall serve on the Executive Committee, and perform such duties as directed by the President and the Adviser and not inconsistent with these Bylaws or other Rules adopted by the Chapter.

Article VII. Meetings

Section 1. There must be at least one regular meeting a month during the school year. The regular ____________________ meeting shall be designated as the annual meeting for the purpose of electing officers, receiving reports of officers and committees, and for any other business which may arise. Other meetings may be held as deemed necessary by the President with the approval of the Executive Committee.

Section 2. Quorum. ____________________ members of the chapter shall constitute a quorum.

Article VIII. Committees

Section 1. The President, in consultation with the Adviser, shall appoint the following committees: (a) Nominating, (b) Auditing, (c) Ways and Means, (d) Social, and (e) Finance and Fund Raising. The President shall appoint additional committees as authorized by the Executive Committee. Duties of committees shall be determined by the Executive Committee and the adopted parliamentary authority.

Article IX. Emblems and Insignia

The Chapter emblems shall be the emblems of the national organization. Only members in good standing may use official emblems and insignia.

Article X. Parliamentary Authority

The rules contained in *Robert's Rules of Order Newly Revised* shall govern the Chapter in all cases to which they are applicable and in which they are not inconsistent with the rules of FBLA, these Bylaws, or any special rules of order the Chapter may adopt.

Article XI. Amendment of the Bylaws

Amendments to the Bylaws shall be submitted in writing at a regular meeting and shall not be voted until the following regular meeting. A two-thirds vote of the members present shall be required for adoption.

From: FBLA/PBL Handbook

SUGGESTED PHI BETA LAMBDA LOCAL CHAPTER BYLAWS

This "Suggested PBL Local Chapter Bylaws," revised April 1, 1979, is intended as a guide. Local Chapter Bylaws shall not be inconsistent with state or national constitutions or Bylaws or with the FBLA-PBL, Inc. charter. Those provisions in the Local Chapter Bylaws which derive from these higher authorities are not amendable at the local level.

PHI BETA LAMBDA

____________ Chapter

BYLAWS

Article I. Name

The name of this organization shall be the ____________________________ Chapter of Phi Beta Lambda.

Article II. Purpose

Section 1. The purpose of this PBL Chapter is to provide opportunities for postsecondary and college students to develop vocational competencies for business and office occupations and business teacher education. PBL is an integral part of the instructional program and in addition promotes a sense of civic and personal responsibility.

Section 2. The specific goals of PBL are to:

- Develop competent, aggressive business leadership
- Strengthen the confidence of students in themselves and their work
- Create more interest in and understanding of American business enterprise
- Encourage members in the development of individual projects which contribute to the improvement of home, business and community
- Develop character, prepare for useful citizenship, and foster patriotism
- Encourage and practice efficient money management
- Encourage scholarship and promote school loyalty
- Assist students in the establishment of occupational goals
- Facilitate the transition from school to work.

Article III. Membership

Section 1. Membership shall consist of these classes of members:

Active Members shall be students participating in the fields of business, office, or business teacher education at ______________ ______________________ who accept the purpose of PBL and subscribe to its creed. Active members shall pay dues as established by PBL and may participate in national events in accordance with the guidelines of the National Awards Program, serve as voting delegates to the National Leadership Conference, hold national office, and otherwise represent their state and local chapters as approved by their respective state and local advisers.

Alumni Members shall be persons who have terminated their active in-school membership and who continue to comply with the rules and policies of FBLA-PBL. Former members of FBLA-PBL shall be eligible for membership in the Alumni Division and shall become members upon payment of dues. Students enrolled in undergraduate programs in a school with an active FBLA or PBL chapter shall not be eligible for membership in the Alumni Division. Graduate students who are former members of FBLA-PBL shall be eligible for membership provided that they do not hold membership in another division.

Professional Members shall be persons associated with or participating in the professional development of PBL as approved by state chapters. Such members may include local and state chapter advisers, business teachers, business teacher educators, state supervisors of business and office education, employers or supervisors of cooperative work-training students, advisory council members, businesspersons, and other persons contributing to the growth and development of PBL. Professional members shall pay dues as established by PBL, but shall not participate in events, serve as voting delegates, or hold office.

Honorary Life Members may be elected to a local chapter by a majority vote. They shall be persons who are assisting in the advancement of business and office education and/or who are rendering outstanding service to the Chapter. Honorary Life Members shall not vote or hold office and shall not be required to pay dues.

Section 2. Members shall hold membership in their state and national chapters. Individual members shall be recognized only through a state chapter of PBL except that, in the case where there is no state chapter, the member shall be recognized by the national office.

Article IV. Dues and Finance

Section 1. The membership dues in Phi Beta Lambda shall be $_________ a year, of which $_________ shall be remitted to the PBL National Office in payment of the national dues by November 1 and $_________ to the PBL state chapter in payment of state dues.

Section 2. The fiscal year of PBL shall be July 1 through June 30.

Section 3. An audit shall be made annually by the auditing committee which shall report at the annual meeting.

FBLA/PBL Suppplement 1 (continued)

Article V. Officers and Elections

Section 1. Officers of the Chapter shall be: president, vice-president, secretary, treasurer, reporter, historian, and parliamentarian. These officers with the adviser as ex-officio member shall constitute the Executive Committee. Officers shall be elected at the annual meeting and shall hold office for a term of one year or until their successors are elected. Officers shall assume their duties at the close of the meeting at which they were elected.

Section 2. The Chapter shall have an Adviser who shall be a faculty member from the business department. This chapter may have as many special-emphasis groups under the chapter charter as it deems necessary to meet the interests of all students and shall assume full responsibility for coordinating the program for these interest groups.

Section 3. The Chapter shall have an Advisory Council which shall consist of two or more honorary life members, the Chapter Adviser, and other area business leaders.

Article VI. Duties of Officers

Section 1. *The President* shall (a) preside over all meetings of the Chapter, (b) appoint all committees and serve as an ex-officio member of these committees, (c) and promote the growth and development of PBL.

Section 2. *The Vice-President* shall (a) preside in the absence of the president, (b) and assist the president.

Section 3. *The Secretary* shall (a) keep an accurate record of the chapter and executive committee meetings, (b) and submit the required reports to the State Chapter and the National Office.

Section 4. *The Treasurer* shall (a) act as custodian of the funds of the organization, collect dues, and give financial reports, (b) and send the membership list with dues to the state and national offices.

Section 5. *The Historian* shall (a) maintain records of the Chapter, including an annual report of its activities, awards, and publicity.

Section 6. *The Parliamentarian* shall (a) serve in any capacity as directed by the president, (b) and advise the president or presiding officer on points of parliamentary procedure.

Section 7. *The Reporter* shall (a) act as public relations officer for the Chapter, (b) see that news stories and photographs are delivered to the school paper, the local newspaper, the state news bulletin, and the national *Tomorrow's Business Leader,* (c) and cooperate with the school official concerning assembly, radio, and television programs.

These officers shall serve on the Executive Committee, and perform such duties as directed by the President and the Adviser and not inconsistent with these Bylaws or other Rules adopted by the Chapter.

Article VII. Meetings

Section 1. There must be at least one regular meeting a month during the school year. The regular ________________ meeting shall be designated as the annual meeting for the purpose of electing officers, receiving reports of officers and committees, and for any other business which may arise. Other meetings may be held as deemed necessary by the President with the approval of the Executive Committee.

Section 2. Quorum. ________________ members of the chapter shall constitute a quorum.

Article VIII. Committees

Section 1. The President, in consultation with the Adviser, shall appoint the following committees: (a) Nominating, (b) Auditing, (c) Ways and Means, (d) Social, and (e) Finance and Fund Raising. The President shall appoint additional committees as authorized by the Executive Committee. Duties of committees shall be determined by the Executive Committee and the adopted parliamentary authority.

Article IX. Emblems and Insignia

The Chapter emblems shall be the emblems of the national organization. Only members in good standing may use official emblems and insignia.

Article X. Parliamentary Authority

The rules contained in *Robert's Rules of Order Newly Revised* shall govern the Chapter in all cases to which they are applicable and in which they are not inconsistent with the rules of PBL, these Bylaws, or any special rules of order the Chapter may adopt.

Article XI. Amendment of the Bylaws

Amendments to the Bylaws shall be submitted in writing at a regular meeting and shall not be voted until the following regular meeting. A two-thirds vote of the members present shall be required for adoption.

From: FBLA/PBL Handbook

FBLA/PBL Supplement 2

FBLA/PBL OFFICER APPLICATION

Name ______________________ Year in School ______________________

Office for which you are applying ______________________

Why are you applying for this office?

List business courses you are taking or have taken:

Grade Point Average ______________ Number of days absent ______________

Other extra-curricular activities:

Will you spend extra time on Parliamentary Procedures? Yes ______ No ______

Will you spend extra time planning and conducting meetings and activities? Yes ______ No ______

Do your parents/guardians approve of your running for office? Yes ______ No ______

Does your employer approve of your running for office? Yes ______ No ______

Approved ______________________ Parent/Guardian

Signed ______________________ Student

Approved ______________________ Advisor

______________________ Principal

FBLA/PBL-18

FBLA/PBL Supplement 3

BRAINSTORMING SHEET

TYPES OF ACTIVITIES	IDEAS
Professional	
Civic	
Service	
Social	
Financial	

FBLA/PBL Supplement 4

PROGRAM OF WORK CALENDAR

TYPE OF ACTIVITIES	(MONTH)	RESPONSIBILITY
Professional		
Civic		
Service		
Social		
Financial		

TYPE OF ACTIVITIES	(MONTH)	RESPONSIBILITY
Professional		
Civic		
Service		
Social		
Financial		

FBLA/PBL Supplement 5

PROGRAM OF WORK EVALUATION

(suggested point values)	10	7	7	3	5	
MONTH	PROFESSIONAL	CIVIC	SERVICE	SOCIAL	FINANCIAL	*TOTAL
SEPTEMBER						
OCTOBER						
NOVEMBER						
DECEMBER						
JANUARY						
FEBRUARY						
MARCH						
APRIL						
MAY						

Questions: 1. Does the Program of Work reinforce all goals of the organization? ________

2. Did the chapter design a "balanced" Program of Work? ________

3. Will the Program of Work project a positive image of FBLA/PBL to the business community, the school, the members, other students, and to all other publics served by the organization? ________

*Number of activities x point values.

FBLA/PBL Supplement 6

EVALUATIVE CRITERIA
FOR FBLA-PBL CHAPTER ACTIVITIES

	No 1	Somewhat 2	Yes 3
Does the FBLA-PBL activity reinforce the goals of the organization.			
a. Develop competent, aggressive business leadership	___	___	___
b. Strengthen the confidence of students in themselves and their work	___	___	___
c. Create more interest in and understanding of American business enterprise	___	___	___
d. Encourage members in the development of individual projects which contribute to the improvement of home, business and community	___	___	___
e. Develop character, prepare for useful citizenship, and foster patriotism	___	___	___
f. Encourage and practice efficient money management	___	___	___
g. Encourage scholarship and promote school loyalty	___	___	___
h. Assist students in the establishment of occupational goals	___	___	___
i. Facilitate the transition from school to work.	___	___	___
Can this activity be a business learning experience?	___	___	___
Can the majority of the members participate in this activity?	___	___	___
Has the activity been well-planned and all details considered?	___	___	___
Has the activity been attempted in the past?	___	___	___

If yes:
a. What were the problems encountered?

____

____

b. How will the problems be overcome this time?

____

____

Are there any risks involved in this activity?	___	___	___
a. Are the risks worth the benefits to be realized?	___	___	___
Has a plan been developed to finance the activity?	___	___	___

If yes:
a. How will funds be raised for this activity?

____

____

Will outside assistance be needed to conduct this activity?	___	___	___

a. Who or what is needed?______________________________

____

b. Can the assistance be generated?	___	___	___
Have the following been informed of the activity?			
a. school administration	___	___	___
b. chapter adviser	___	___	___
c. business advisory council	___	___	___
Has a plan been established to provide:			
a. pre-activity publicity	___	___	___
b. post-activity publicity	___	___	___
Does the activity comply with the criteria?	___	___	___
Does the plan indicate who or what committee will be responsible for this activity?	___	___	___

FBLA/PBL Supplement 7

EVALUATION OF MEETINGS

	No 1	Somewhat 2	Yes 3
1. Are meetings well planned in advance?	____	____	____
2. Do meetings help achieve objectives?	____	____	____
3. Has every member had an opportunity to participate individually or through group activities such as singing, relaxers, or buzz groups?	____	____	____
4. Do meetings provide opportunities for members to work and think together?	____	____	____
5. Have many members had opportunities to serve in leadership roles?	____	____	____
6. Are meetings imaginative and varied?	____	____	____
7. Do meetings challenge each member to greater efforts towards broader objectives?	____	____	____
8. Do meetings start and end on time?	____	____	____
9. Are meetings held regularly on scheduled dates?	____	____	____
10. Are provisions made for physical comfort at meetings?	____	____	____
11. Do meetings have a "cooperative" atmosphere?	____	____	____
12. Have good parliamentary procedures been used when applicable?	____	____	____
13. Has time been used wisely?	____	____	____

APPLYING FOR A JOB

DESCRIPTION

The average worker under 35 years of age goes about the job-hunt once every 1 1/2 years and will change careers three to five times in his or her lifetime. In an interview, people need to know how to sell the most important product of all--themselves--their capabilities and their educational skills. Classroom instruction can do much to help people secure good jobs, keep their jobs, and advance in their jobs.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Job Interview, Mr. and Ms. FBLA, Mr. and Ms. Future Business Executive.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Finding A Job Job Application Blank Job Resume Letter of Application Job Interview Follow-Up	Job Adjustment	Job Advancement	

APPLYING FOR A JOB - LEVEL I

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
JA-I-1	Given the assignment to find a job	the student will list ten sources for finding a job	with 80% accuracy.
JA-I-2	Given a job application blank	the student will correctly complete the application form legibly, correctly, honestly, and completely	with 100% accuracy.
JA-I-3	Given an assignment of preparing a resume	the student will compose and type a resume	with an acceptable rating on all items of the Job Resume Evaluation Checklist.
JA-I-4	Given a want ad from a local newspaper	the student will compose and type a letter of application	with an acceptable rating on all items of the Letter of Application Evaluation Checklist.
JA-I-5	Given a simulated job interview situation	the student will prepare for and participate in a personal interview	resulting in the interviewer "hiring" the prospective student.
JA-I-6	Given a case study	the student will compose a follow-up thank you and acceptance or rejection letter neatly and in correct format either in writing or typing	with 100% accuracy.

APPLYING FOR A JOB - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
JA-I-1	Finding a Job Classified ads Yellow pages Personal sources (friends, family, former employers, teachers, coordinators, etc.) Civil Service Department of Economic Security Youth Employment Agencies School or college placement services and counselors Private employment agencies Volunteer work Temporary services	JA-I-1	Have students clip advertisements for business or office positions from local or area newspapers that have appeared in the past month. These clippings can be used for bulletin board displays, discussions, case studies, etc. Invite speakers from private and public employment agencies.
JA-I-2	Job Application Blank	JA-I-2	Gather job application forms from a variety of businesses. Have students complete practice application blanks. Have students complete a folder which will contain: 1. Application blanks, 2. Resume, 3. Letter of Application, 4. Follow-up letters, 5. W-4 Form
JA-I-3	Job Resume Style and appearance Content Name, address, phone number	JA-I-3	Gather sample resumes to use for discussing styles. Have students complete a personal inventory in preparation for composing and typing the rough draft resume.

APPLYING FOR A JOB - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Job Resume (Continued) Job Objective Experience Education Skills Awards and activities References		Have students obtain permission for references. Ask graduating seniors to give a copy of a current personal resume to the department chairperson to be used as a source reference by the placement office. Materials should be returned to the department for follow-up purposes.
JA-I-4	Letter of Application Style and appearance Content Opening/Reason for writing Point out features of resume Ask for interview	JA-I-4	Have student compose and type practice letters of application in response to: classified ad referral by a friend firm that has not advertised Gather samples of letters of application for student review.
JA-I-5	Job Interview Time and place Research the company Personal appearance The receptionist's area The interview Employment testing	JA-I-5	Role playing of interviews--utilize staff, advisory committee member, or businessperson to conduct interview. Video tape, if possible. Use films. Discuss attitudes during interviewing, grooming, poise. Share past interview experiences by students. Have students brainstorm about information that an employer might want to consider about an applicant.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Job Interview (Continued)		Obtain booklet, "Making the Most of Your Job Interview", New York Life Insurance Co., 51 Madison Avenue, New York, NY 10010. (May be ordered free through local agent.) Secure pre-employment tests and give to students to practice. Invite speakers from private and public employment agencies to discuss interviewing techniques and pre-employment tests. See: Pre-Interview Checklist page JA-9 Interview Hints, page JA-10 Reasons Why Prospective Employees Fail in the Interview, page JA-11
JA-I-6	Follow-up Thank you techniques Accepting and rejecting job	JA-I-6	Discuss methods of follow-up, such as thank you letter immediately after interview, telephone or personal call. Discuss methods of accepting or rejecting a position. Have students compose and type the following practice letters: Thank you Letter of acceptance Letter of rejection

JA-1-3

JOB RESUME EVALUATION CHECKLIST

*Rating

	Acceptable	Unacceptable
Material is balanced horizontally on the page		
Material is balanced vertically on the page		
Total appearance		
All errors corrected neatly		
Essential areas covered (i.e. education, past employment, etc.)		
All information complete and correct		
Proper use of grammar and punctuation		
Proper business style (i.e. proper use of zip codes, state abbreviations, titles, etc.)		
Permission obtained from references		

*ALL items must receive an acceptable rating.

LETTER OF APPLICATION EVALUATION CHECKLIST

	*Rating	
	Acceptable	Unacceptable
CONTENT		
Stated job for which you are applying and where you heard about it		
Stated qualifications		
Stated telephone number, including area code		
Requested interview		
Used proper grammar and punctuation		
Signed name legibly in ink		
FORMAT		
Typed return address and current date in correct position		
Typed inside address, including ZIP code, in correct position		
Used correct inside address		
Used correct salutation		
Used single spacing for the body of the letter with double spacing between paragraphs		
Typed closing lines in correct position		
Placed letter correctly on page		
Typed enclosure, if needed		
Corrected all errors neatly		

*ALL items must receive an acceptable rating.

JA-1-5

JOB INTERVIEW EVALUATION CHECKLIST

Student Interviewed________________________________

Date Interviewed________________________________

Position Applied For________________________________

Receptionist________________________________

Interviewer________________________________

	Rating		
	Acceptable	Unacceptable	Comments
PRE-INTERVIEW (RECEPTIONIST)			
Promptness			
Proper greeting			
Correct self-introduction			
Attitude			
General impression			
INTERVIEW (INTERVIEWER)			
Personal appearance			
Demonstration of initiative and drive			
Poise and self-confidence			
Diction			
Mannerisms			
Appropriateness of answers			
Grammar			
Attitude			
Courtesy			
Closing			
Qualifications for job			

WOULD YOU HIRE THIS PERSON? ________ yes ________ no

JA-8

A PRE-INTERVIEW CHECKLIST

Are you properly dressed and groomed for an interview?

Have you gathered all the information you need about the company - its products, its policies, its status in the community.

Do you know the interviewer's name? If not, obtain it from the receptionist before the interview.

Have you mentally formulated answers to the usual factual questions and also to possible unusual questions that the interviewer may ask?

Are you prepared for an interview? Be sure to take -

Your personal data sheet
Your social security card
A complete school record showing "To" and "From" dates
A tabulated summary of your college courses
A record of your business skills and personal accomplishments (unless included on personal data sheet)
Letters of reference (Some personnel experts question the value of open letters of recommendation. You may decide to omit them.
List of personal references
Your employment record, including dates, names, addresses of employers, duties performed, and name of immediate supervisor
List of questions you wish to ask the interviewer
A pen and well-sharpened pencils
A small notebook for dictation (you may be asked to take an employment test)
A good pocket-size dictionary
Correction materials

From Hanna, Popham, Tilton, SECRETARIAL PROCEDURES AND ADMINISTRATION, Seventh Edition. Used with permission of South-Western Publishing Co., Cincinnati, Ohio.

INTERVIEW HINTS

1. Go to the interview alone.
2. Arrive at least 10 minutes early.
3. Dispose of chewing gum and lighted cigarettes before entering the interviewer's office.
4. Don't get annoyed or restless while waiting.
5. While waiting in the outer office, watch what goes on around you. Read company literature.
6. Smile and give your name distinctly when greeting the interviewer.
7. Do not expect the interviewer to rise when you enter the room.
8. Don't sit down until asked.
9. When seated, try to sit comfortably and erect.
10. Let the interviewer take the initiative.
11. Look directly at the interviewer when talking.
12. Avoid using slang expressions.
13. Never criticize others, including your former employer, even if justified.
14. Never beg for a job or be boastful.
15. Do not contradict the interviewer.
16. Don't discuss personal problems.
17. Don't use generalities when answering questions.
18. Do not exaggerate previous positions or their salaries.
19. Be able to relate your qualifications and experiences readily. If you have never worked steadily before, relate or volunteer extracurricular and part-time work experience.
20. Stress your strong points.
21. Answer questions in full rather than merely nodding or saying "yes" or "no"
22. Do not distract from the conversation by fidgeting with your handkerchief, purse, keys, or other objects, and refrain from nervous mannerisms, such as wringing your hands or flexing your fingers.
23. Do not look at or touch anything on the interviewer's desk.
24. Don't smoke unless given permission to do so.
25. Indicate preference as to jobs desired. Never say, "I'll take anything."
26. Show interest in the job for which you are applying.
27. Volunteer any important information which you feel is being overlooked or mimimized to your disadvantage.
28. Leave promptly when the interviewer indicates the interview has ended.
29. Express appreciation for the interview. If you don't get the job, even if you get no encouragement, smile and be a good sport.
30. When leaving, thank the person in the front office who introduced you.

From Kishner, Keily, HOW, TO FIND AND APPLY FOR A JOB, Third Edition. Used with permission of South-Western Publishing Co., Cincinnati, Ohio.

REASONS WHY PROSPECTIVE EMPLOYEES FAIL IN THE INTERVIEW

1. Too interested in starting salary.
2. Uncertainty on wants in starting-job, or long-range goals.
3 Too much expected too fast.
4. Too theory-minded—feet not on the ground.
5. Too much stress on security compared to opportunity.
6. Failure to investigate company or industry.
7. Too "training program" minded.
8. Poor expression, orally or in written aplication.
9. Inability to sell himself.
10. Conviction of no opportunity in this area.

The Northwestern University Placement Office found that applicants were frequently rejected because of the following:

1. Poor personal appearance.
2. Overbearing - overaggressive - conceited "superiority complex" - "know-it-all."
3. Inability to express oneself clearly - poor voice, diction, grammar.
4. Lack of learning for career - no purpose and goals.
5. Lack of interest and enthusiasm - passive, indifferent.
6. Lack of confidence and poise - nervousness - ill-at-ease.
7. Failure to participate in activities.
8. Overemphasis on money - interest only in best dollar offer.
9. Poor scholastic record - just got by.
10. Unwilling to start at the bottom - expects too much too soon.
11. Makes excuses—evasiveness—hedges on unfavorable factors in record.
12. Lack of tact.
13. Lack of maturity.
14. Lack of courtesy - ill mannered.
15. Condemnation of past employers.
16. Lack of social understanding.
17. Marked dislike for school work.
18. Lack of vitality.
19. Fails to look interviewer in the eye.
20. Limp, fishy hand-shake.
21. Indecision.
22. Loafs during vacations - lakeside pleasures.
23. Unhappy married life.
24. Friction with parents.
25. Sloppy application blank.
26. Merely shopping around.
27. Wants job only for short time.
28. Little sense of humor.
29. Lack of knowledge of field of specialization.
30. Parents make decisions for him.
31. No interest in company or in industry.
32. Emphasis on whom he knows.
33. Unwillingness to go where we send him.
34. Cynical.
35. Low moral standards.
36. Lazy
37. Intolerant—strong prejudices.
38. Narrow interests
39. Spends much time in movies.
40. Poor handling of personal finances.
41. No interest in community activities.
42. Inability to take criticism.
43. Lack of appreciation of the value of experience.
44. Radical ideas.
45. Late to interview without good reason.
46. Never heard of company.
47. Failure to express appreciation for interviewer's time.
48. Asks no questions about the job.
49. High-pressure type.
50. Indefinite response to questions.

From Kishner, Keily, HOW TO FIND AND APPLY FOR A JOB, Third Edition. Used with permission of South-Western Publishing Co. Cincinnati, Ohio.

APPLYING FOR A JOB - LEVEL II

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
JA-II-1	Given materials to read, lectures, and an opportunity for discussion on keeping a job	the student will compose and type a 2-page report on how to keep a job	within 50 minutes with an acceptable rating on all items of the Keeping a Job Evaluation Checklist.

APPLYING FOR A JOB - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
JA-II-1	Job Adjustment W-4 Employee Withholding Form Keeping a Job	JA-II-1	Invite guest speakers from public and private business to discuss how to keep a job. See: What the Employer Expects from Office Workers page JA-15.

JA-II-1

WHAT THE EMPLOYER EXPECTS FROM OFFICE WORKERS

Production
- First things first
- Deadlines
- Volume
- Working under pressure

Quality of Work
- Accuracy
- Punctuation
- Telephone techniques
- Safety, orderliness, neatness

Work Relations
- Ability to work well with others
- Tact
- Judgment
- Diplomacy
- Compliance with policies

Personal Characteristics
- Pleasing voice
- Appearance
- Punctuality
- Confidence
- Good health
- Dependability
- Flexibilty
- Initiative

Attitude
- Enthusiasm
- Adaptability
- Cooperation
- Courtesy

Education
- Training
- "Know How"
- Improvement

Additional Efforts
- Desire-to-do
- Ambition
- Self-Control

Energy Conservation
- Comfortable attire
- Compliance with company policies
- Efficient use of electricity
  - Turn off machines when not in use
  - Turn off lights in work areas when not in use

Inform students what the employer expects and emphasize these factors throughtout the entire course.

JA-11-1

KEEPING A JOB EVALUATION CHECKLIST

	*Rating	
	Acceptable	Unacceptable
Report is typed in a neat and correct format		
Errors are corrected neatly		
Correct use of grammar and punctuation		
Length of report		
Report contains at least five facts and explanation of those facts from individual's resources (i.e. importance of punctuality, quality, production and human relations)		

*ALL items must receive an acceptable rating.

APPLYING FOR A JOB - LEVEL III

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
JA-III-1	Given materials to read, lectures, and an opportunity for discussion on job advancement	the student will compose and type a 2-page report on job advancement	within 50 minutes with an acceptable rating on all items of the Job Advancement Evaluation Checklist.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
JA-III-1	Job Advancement	JA-III-1	Invite guest speakers from public and private business and/or former students who are employed. Have student use GIS (computer career services) to explore career ladders and related career opportunities. Have students organize a career day where professionals from various fields are invited to discuss career opportunities. See: What the Employer Expects from Office Workers page JA-15.

JA-III-1

JOB ADVANCEMENT EVALUATION CHECKLIST

	*Rating	
	Acceptable	Unacceptable
Report is typed in a neat and correct format		
Errors are corrected neatly		
Correct use of grammar and punctuation		
Length of report		
Report contains at least five facts and explanation of those facts from individual's resources		

*ALL items must receive an acceptable rating.

COMPETENCY PROFILE
for
APPLYING FOR A JOB

Student Name____________________________

Start Date____________________

Completion Date____________________

		(date/initials) QUALIFIED	NOT QUALIFIED
JA-I-1	Finding Job Sources		
* JA-I-2	Job Application Blank		
* JA-I-3	Job Resume		
JA-I-4	Letter of Application		
* JA-I-5	Job Interview		
JA-I-6	Follow-Up Letters: Thank you letter		
	Acceptance or rejection letter		
JA-II-1	W-4 Employee Withholding Form		
	Keeping a Job Report		
JA-III-1	Job Advancement Report		

CERTIFICATE OF COMPETENCY AWARDED____________________________
Date Initials

*Indicates competencies required for a Certificate of Competency.

CERTIFICATE
OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

APPLYING FOR A JOB

Completion Date ______________ School ________________________________

Instructor ________________________________

LEVEL I

________ Job Application Blank

________ Job Resume

________ Job Interview

RECORD KEEPING

DESCRIPTION

The keeping of neat, accurate records is vital to the successful operation of any business. The ability to sort, check, and verify statistical records and other forms for completeness and differences are tasks employees will encounter in offices. This program is designed to help the student gain a competent level of skills in record keeping. Criterion-referenced tests are included for some of the tasks.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization, competitive events: Business Math I, Business Math II, and Business Understanding (not a National event).

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Deposits Bank Reconciliation Payroll Calculations Purchase Requisitions Purchase Invoices Inventory Records Petty Cash	Processing Payroll Records Journalizing/Posting--A/P Verifying Invoices Writing Checks Journalizing/Posting--C/P Journalizing/Posting--A/R Journalizing/Posting--C/R	Payroll Tax Report	

RECORD KEEPING - LEVEL I

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
		BANKING - LEVEL I	
RK-I-1	Given a checkbook, deposit slips, and a stated amount of money (coins, checks, and currency)	the student will endorse checks with proper endorsement, fill out deposit slip, and complete checkbook stub	with 100 percent accuracy.
RK-I-2	Given a bank statement and a checkbook	the student will reconcile the statement with the checkbook stub balance	with 100 percent accuracy.
		PAYROLL - LEVEL I	
RK-I-3	Given time cards, rates of pay, and company policy for computing hours	the student will calculate (a) the number of regular, overtime, and total hours worked, and (b) the gross pay	with 80 percent accuracy
		ACCOUNTS PAYABLE - LEVEL I	
RK-I-4	Given blank purchase requisitions and the necessary information	the student will prepare purchase requisitions	with 80 percent accuracy.
RK-I-5	Given blank purchase orders and prepared purchase requisitions	the student will prepare purchase orders	with 80 percent accuracy.

RECORD KEEPING - LEVEL I
(Continued)

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
ACCOUNTS RECEIVABLE - LEVEL I			
RK-I-6	Given blank invoices and the necessary information	the student will prepare invoices, checking extensions and calculate any sales tax	with 80 percent accuracy.
INVENTORY - LEVEL I			
RK-I-7	Given inventory records	the student will make all extensions	with 80 percent accuracy.
PETTY CASH - LEVEL I			
RK-I-8	Given transactions paid by petty cash	the student will determine amount needed to replenish the fund	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
			Enabling Tasks:
			The student should acquire the following fundamental skills necessary for processing records.
			1. Legibility in writing numbers and words 2. Accuracy 3. Neatness 4. Ability to follow instructions 5. Copying and verifying abilities 6. Arithmetic skills
			Hint: Have students use a card or a ruler as a guide to follow copy when verifying numbers and proofreading other materials. Also, provide students with special hints on correct methods for reading numbers when checking. One method is running an adding machine tape and comparing it with the stated total.
RK-I-1	Banking Terminology Banking Services Bank Drafts Commercial Sight Time	RK-I-1	Prepare handout sheet containing terms and definitions. Discuss in class. Stress importance of maintaining neat, accurate records and keeping receipts.
			Prepare bulletin board with sample of local forms such as bank statements, deposit slips, signature cards.

RECORD KEEPING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RK-I-1	Bank Notes Promissory Collateral Note Mortgage Note Money Orders Travelers Checks Safe Deposit Boxes Investment Services	RK-I-1	Fill out bank signature cards. Give out imitation money, blank checks and deposit slips and have student fill out deposit slip.
RK-I-1	Opening Accounts Making Deposits Writing Checks Endorsing Checks Blank Restrictive Special	RK-I-1	Use transparencies to illustrate writing a check and completing the stub or register. Provide drill exercises in writing checks and preparing deposit slips and recording on checkbook register stub. Invite bank official to speak to class regarding difficulties banks face in handling checks, account transactions of customers who are careless in writing, endorsing, and cashing checks. Have students write checks payable to another student and have different payees endorse same check. Exchange of papers emphasizes the importance of handwriting.
RK-I-2	Reconciliation Bank Statement Canceled Checks Procedure Outstanding Checks Bank Charges	RK-I-2	Using checks and deposit slips which students have prepared in drill exercises, prepare a bank statement. The statement should contain a minimum of 10 transactions. Have students reconcile the statement with checkbook figures provided.

RECORD KEEPING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RK-I-3	Payroll Terminology Social Security Numbers W-4 and W-4E Forms Time Cards Regular Hours Overtime Hours Rate of Pay Regular Overtime Salaried	RK-I-3	Suggest to the students who do not have a social security number that they apply for a social security card. Secure W-4 and W-4E forms and have students complete. Distribute a weekly time card to each student. Using each class period as an 8-hour day, have students keep record of their hours for the week. Tardies should be reflected in the "time in." (Dock 15 minutes for each minute late. May do weekly for a number of weeks). Have students calculate their weekly earnings (randomly assign different rates) using time cards prepared in above suggestions. Provide drill exercises for students to figure wages at salaried, regular, and overtime rates. Discuss how wages and hours worked are affected by federal regulations.
RK-I-4	Accounts Payable Purchase Requisitions	RK-I-4	Have students prepare a flow chart routing purchases beginning with Purchase Requisition to payment of invoices.
RK-I-5	Purchase Orders Chronological File (Invoice Due Date) Trade Discounts	RK-I-5	Have students set up chronological file to be used when processing invoices for payment in simulated activities at levels II and III. Provide exercises converting percentages to decimals.

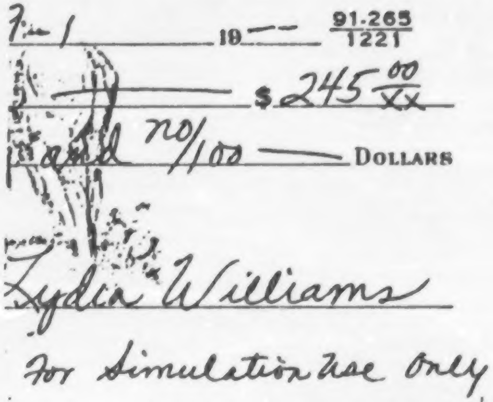
CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RK-I-5	Purchase Orders (Continued)	RK-I-5	Use newspaper advertisements with percentages to provide practice exercises in calculating discounts. Secure copies of trade catalogs for classroom use in calculating trade discounts as drill exercises.
RK-I-6	Accounts Receivable Invoices Extensions Sales Tax Bills of Lading	RK-I-6	Use samples to identify and explain the different parts of invoices. Use purchase order (buyer's form), invoice (seller's form), and bill of lading for same order and make a similarity comparison. Provide math exercises in addition, multiplication, and decimals. Provide drill exercises using sales tax tables.
RK-I-7	Inventory Perpetual Periodic Physical	RK-I-7	Prepare dulpicate sets of index cards with one 4-digit or larger number per card. Divide the class into 4 groups and pass out the cards at random--2 cards to each student. Each student must find a matching card for either number and surrender only one card to another student when requested. Each student returns to the assigned group with one matched pair. (At this time, a group leader may be selected.) The group then arranges their cards in numerical order and prepares a list--giving both the cards and the list to the instructor. The group turning in the first correct list receives points, rewards, etc. (Use numbers easy to misread and transpose.) Follow the above activity with a worksheet for each student to compare numbers and prepare numerical list.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Inventory (Continued)		Display samples of inventory cards. Provide math exercises in obtaining subtotals using both addition and subtraction. Have each student take a physical inventory of the classroom. Provide cost list for students to make extensions. Using physical inventory sheets completed above, prepare perpetual inventory cards for each item. Give handout sheets with inventory changes to be recorded on the cards.
RK-I-8	Petty Cash Petty Cash Box Petty Cash Voucher Petty Cash Record Balance of Fund Replenish Fund	RK-I-8	Divide the class into small groups. Give each student a petty cash fund (imitation money) of $100, petty cash vouchers, receipts, petty cash record sheet, and a number of expenses to pay. Within each group students are to handle these transactions. After completing these petty cash items, each student completes the petty cash record, replenishing the fund. (Extend activity over a 1-week period with 2 to 3 transactions per day.)

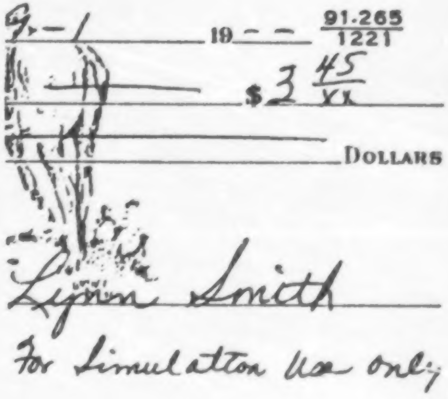
CHECKS, DEPOSIT SLIPS, AND CHECKBROOK STUBS CRITERION-REFERENCED TEST

Directions: Endorse given checks using restrictive endorsement, deposit together with coins and currency, and complete the checkbook stub.

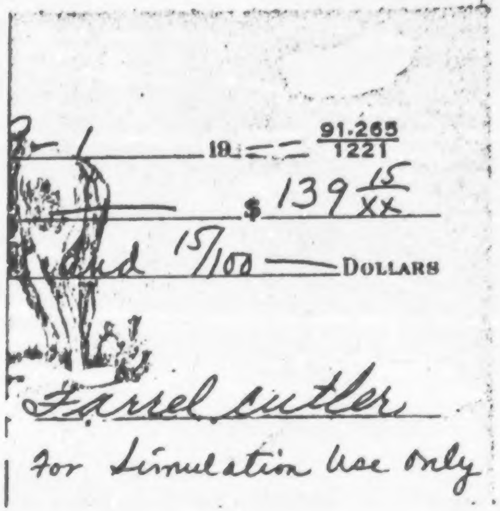
Pay to the order of
Anytown Bank
FBLA of Arizona


9-1 19-- 91-265/1221
$ 245 00/xx
and no/100 — DOLLARS
Lydia Williams
For Simulation Use Only

Pay To the Order of
Anytown Bank
FBLA of Arizona


9-1 19-- 91-265/1221
$ 3 45/xx
DOLLARS
Lynn Smith
For Simulation Use Only

Pay to the order of
Anytown Bank
FBLA of Arizona


9-1 19-- 91-265/1221
$ 139 15/xx
and 15/100 — DOLLARS
Farrel cutler
For Simulation Use Only

RK-I-1 **CHECKS, DEPOSIT SLIPS, AND CHECKBOOK STUBS CRITERION-REFERENCED TEST**

Coins: quarters--13
dimes-- --55
nickels --36

Currency: $20-- 7
$10-- 9
$ 5--11
$ 1--15

Check stub--Beginning balance is $1,416.37

ANYTOWN BANK

DATE September 1 19--

ACKNOWLEDGE RECEIPT OF CASH RETURNED BY SIGNING ABOVE

FOR DEPOSIT TO THE CHECKING ACCOUNT OF:

CURRENCY	300	00
COIN	10	55
CHECKS		
TOTAL FROM REVERSE SIDE	387	60
TOTAL	698	15
LESS CASH RECEIVED		
NET DEPOSIT	698	15

By using this slip the depositor agrees to the conditions printed on the back hereof.

LIST ADDITIONAL CHECKS HERE AND INCLUDE IN TOTAL DEPOSIT ON FRONT OF DEPOSIT SLIP

91-265	139	15
91-265	245	00
91-265	3	45
TOTAL ADDITIONAL CHECKS — CARRY TOTAL TO FRONT OF DEPOSIT SLIP.	387	60

NO. 1 $
DATE 19
TO
FOR

	DOLLARS	CENTS
BALANCE	1,416	37
AMT. DEPOSITED	698	15
TOTAL	2,114	52
AMT. THIS CHECK		
BALANCE		

RK-1-1

CHECKS, DEPOSIT SLIPS, AND CHECKBOOK STUBS MEASUREMENT

Competency Standard--100%

	Acceptable	Unacceptable
1. Correct endorsement		
2. ABA number included on deposit slip		
3. Total of checks brought forward from reverse side		
4. All amounts on deposit slip are correct, including subtotal		
5. Deposit slip is dated		
6. On check stub and deposit slip numbers are aligned correctly.		
7. Amount deposited on check stub agrees with deposit slip		
8. New checkbook balance is correct.		

RK-1-2 No criterion instrument given. Suggested measurement is bank reconciliation with outstanding deposits and checks.

PAYROLL TIME CARD CRITERION-REFERENCED TEST

AME Michael Allen

eek Ending June 13, 19--

Days	Regular				Other		Hours	Earnings
	In	Out	In	Out	In	Out		
on.	7:56	12:00	12:58	5:01			8	2880
ues.	7:57	12:01	12:59	5:00			8	28 80
ed.			12:57	5:01	6:00	9:02	7	25.20
hurs.	7:58	12:00	12:59	5:00			8	28.80
ri.	7:57	12:01	12:58	5:02			8	28.80
at.								
un.								

xtra Hours
pproved

F. Cutler
upervisor

	Hours	Rate	Earnings
Regular	39	3.60	140.40
Overtime	-0-		
Total Hours	39	Gross Earnings	140.40

NAME Rhonda Johnson

Week Ending June 13, 19--

Days	Regular				Other		Hours	Earnings
	In	Out	In	Out	In	Out		
Mon.	7:55	12:00	12:55	5:05			8	32.80
Tues.	7:56	12:03	12:57	5:10			8	32.80
Wed.	7:55	12:01	12:55	5:02	6:00	8:01	10	45.10
Thurs.	7:57	12:02	12:56	5:05			8	32.80
Fri.	7:58	12:01	12:57	5:01	6:00	8:02	10	45.10
Sat.								
Sun.								

Extra Hours
Approved

F. Cutler
Supervisor

	Hours	Rate	Earnings
Regular	40	4.10	164.00
Overtime	4	6.15	24.60
Total Hours	44	Gross Earnings	188.60

Directions: Complete time cards. Daily time is computed in hours and quarter hours. The nearest quarter hour is used to compute the time for beginning and ending work.

RK-1-3

TIME CARDS MEASUREMENT

Regular, Overtime, and Gross Wages

Competency Standard--80%

	Acceptable	Unacceptable
10%--Daily regular hours are computed correctly		
10%--Daily overtime hours are computed correctly		
20%--Daily regular wages are computed correctly		
20%--Daily overtime wages are computed correctly		
20%--Total regular hours x rate = daily column total		
20%--Total overtime hours x rate = daily column total		

RK-1-4 No criterion instrument given. Suggested measurement is to have students prepare purchase requisitions.

RK-1-5 No criterion instrument given. Suggested measurement is to have students use purchase requisitions prepared in RK-1-4 to prepare purchase orders. Student should make all extensions and compute any sales tax.

RK-1-6 No criterion instrument given. Suggested measurement is to give students all information needed and have them make all extensions, compute any sales tax, and prepare invoices.

RK-1-7

INVENTORY CRITERION-REFERENCED TEST

Directions: Complete all extensions on both the physical inventory sheet and the two perpetual inventory cards.

Competency Standard--80% (Equal weight for each entry)

INVENTORY

Page No. 1

Date__________ By__________

No.	Article	Quantity	Unit Price	Total
A63	Typing paper--bond	30	.59	17.70
A64	Typing paper--erasable	28	1.35	37.80
A65	Typing paper--onion skin	13	.80	10.40
A66	Correction tape	12	.89	10.68
A67	Typing erasers	45	.39	17.55
A68	No. 2 pencils	93	.15	13.95
A69	No. 2½ pencils	32	.15	4.80
A70	No. 3 pencils	159	.15	23.85
A71	Ball-point pens	24	.19	4.56
A72	Spiral notebooks	19	1.39	26.41
A73	Notebook paper (50)	169	.59	99.71
A74	Notebook paper (100)	19	.98	18.62
A75	Steno pads	32	.69	22.08
	TOTAL--Page 1			308.11

INVENTORY CARD

STOCK NO. A70

ITEM No. 3 Pencils

Date	Quantity Received	Quantity Sold	Balance
19-- Sept. 1	288		288
5		198	90
12		15	75
15	144		219
17		64	155
24		89	66
27	144		210
30		51	159

INVENTORY CARD

STOCK NO. A73

ITEM Notebook Paper (50 sheets)

Date	Quantity Received	Quantity Sold	Balance
19-- Sep. 1	750		750
5		487	263
12		93	170
17		25	145
24		23	122
27	125		247
30		78	169
30	50		219

RK-1-8

PETTY CASH DISBURSEMENTS CRITERION-REFERENCED TEST

PETTY CASH DISBURSEMENTS REPORT

DATE		DESCRIPTION	Receipts	Payments	Distribution of Payments				
					Office Supplies	Advertising Expense	Contributions	Delivery Expense	Misc.
Sept	1	Postage		15.00					15.00
	2	Cleaning supplies		6.49					6.49
	3	COD Order		3.85				3.85	
	4	Office supplies		4.30	4.30				
	5	United Parcel		6.75				6.75	
	6	Windows washed		15.00					15.00
	7	Ad in high school yearbook		5.50		5.50			
	8	Office supplies		4.75	4.75				
	9	American Cancer Society		12.50			12.50		
		Totals		74.14	9.05	5.50	12.50	10.60	36.49
		Balance		25.86					
			100.00	100.00					

Directions: Record petty cash transactions on the Petty Cash Report and determine amount needed to replenish fund. Petty cash fund has a total of $100.

1. Postage was purchased, $15.
2. Cleaning supplies, $6.49 (misc. expense).
3. COD order was paid, $3.85.
4. Paid $4.30 for office supplies
5. Paid $6.75 to United Parcel for delivery.
6. Paid $15 to have windows washed.
7. Paid $5.50 to local high school for ad in yearbook.
8. Paid $4.75 for office supplies.
9. Donated $12.50 to American Cancer Society.

Total Amount Paid Out	$74.14
Amount of cash before replenishing fund	25.86
Petty Cash Fund Total	$100.00

Competency Standard--100%

RECORD KEEPING - LEVEL II

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
		Payroll—Level II	
RK-II-1	Given completed time cards, individual employees' earnings records, blank payroll checks, blank payroll register, necessary tax tables, cash payments journal, and general ledger accounts	the student will complete and verify payroll records, write checks, journalize and post to proper accounts	with 80 percent accuracy.
		Accounts Payable—Level II	
RK-II-2	Given purchase orders, credit memorandums for purchases returns and allowances, general journal, purchases journal, general ledger, accounts payable subsidiary ledger, and 2-column worksheet	the student will journalize the transactions, post to the proper accounts and prepare a schedule of accounts payable	with 80 percent accuracy.
RK-II-3	Given invoices from creditors and a chronological file	the student will check all extensions, figure any cash discounts, determine the due date, and file in appropriate order in chronological file	with 80 percent accuracy.
RK-II-4	Given a cash payments journal, invoices to be paid, blank checks, general ledger, and accounts payable subsidiary ledger	the student will write checks, record the cash payments transaction in the cash payments journal, and post to the proper general ledger accounts	with 80 percent accuracy.

RECORD KEEPING - LEVEL II

COMPETENCY GOAL
(Continued)

Accounts Receivable—Level II

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
RK-II-5	Given invoices and credit memorandums for sales returns and allowances, general journal, sales journal, general ledger, accounts receivable subsidiary ledger, and 2-column worksheet	the student will journalize the transactions, post to the proper accounts, and prepare a schedule of accounts receivable	with 80 percent accuracy.
RK-II-6	Given a cash receipts journal, a list of cash transactions, a general ledger, and accounts receivable subsidiary ledger	the student will journalize the transactions in the cash receipts journal and post to the proper general ledger accounts	with 80 percent accuracy

RECORD KEEPING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RK-II-1	Payroll Records Employees' Earning Records Gross earnings Taxes withheld Other deductions Net pay Payroll Register Required deductions Federal Income Tax Social Security State Income Tax City Income Tax Voluntary deductions Insurance Life Medical Hospitalization Pension Savings Banks Credit Unions Bonds Charity Donations Miscellaneous Dues Loans Journalizing Posting	RK-II-1	Invite payroll clerk as guest speaker. Use sample payroll check stubs for students to analyze the difference in gross and net pay. Secure as many federal forms as possible to use in class activities. Supply tax tables, payroll check stubs with only gross amount, number of exemptions, marital status, and basis of pay for students to complete payroll check stub. Give students realistic wages for average entry-level employees and have students compute net earnings for their own current status. SUGGESTION: Use blank payroll check stubs for student to fill in. Give each student a sample register with one or two entries and have students enter their own as well as all other students' payroll check stubs prepared in above suggestions. (These should be entered in alphabetical order; class should be divided alphabetically into small groups.) Give each student one individual employee's earnings record to complete heading information for use in payroll simulations utilizing teaching suggestion RK-I-3 (weekly time cards). Have student fill out W-4 and W-4E form. Use T-accounts to show debits = credits.

<table>
<tr><th>CODE</th><th>OUTLINE</th><th>CODE</th><th>LEARNING ACTIVITIES AND TEACHING SUGGESTIONS</th></tr>
<tr><td></td><td>Payroll Records
(Continued)</td><td></td><td>Use overhead to demonstrate method of journalizing and posting to ledger.

Follow through with practical exercise using payroll register previously prepared as a learning exercise.</td></tr>
<tr><td>RK-II-2</td><td>Accounts Payable
Purchases Journal
General Ledger
Purchases
Accounts Payable
Subsidiary Ledger
Schedule of Accounts Payable
Purchases Discounts
Purchases Returns and Allowances</td><td>RK-II-2</td><td>Prepare a list of ledger accounts that will be used in record keeping. Give students a list of transactions and have them analyze which accounts will be changed by these transactions. (This learning activity may be illustrated by use of T-accounts on the blackboard.)

Prepare a simulation exercise to teach the use of purchases and sales transactions. Give each student a sheet with both a purchases journal and sales journal.

Purchases Journal<table><tr><th>Date</th><th>Creditor's Name</th><th>Terms</th><th>Inv. No.</th><th>Amount</th></tr></table>
Sales Journal<table><tr><th>Date</th><th>Inv. No.</th><th>Customer's Name</th><th>Amount</th></tr></table>
Give each student 5 index cards listing an item with dollar amount on each to be sold to another class member. Cards should be numbered; numbers will be used as invoice numbers in journals. Students will make purchases from each other; and at the time of each transaction, each student will journalize in the sales journal, depending on whether they are selling or purchasing.</td></tr>
</table>

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Accounts Payable (Continued)		Terms for all odd-numbered index cards will be 2/10, n/30. All students should have at least 5 transactions recorded in both journals. You may suggest that some students return merchandise or request credit for merchandise damaged. After all transactions have been made, the teacher will hand out sheets with Acounts Payable subsidiary ledger accounts and Accounts Receivable subsidiary ledger accounts. Students will then post to these accounts. This simulation may be continued in RK-II-3, RK-II-4, RK-II-5, and RK-II-6.
RK-II-3	Invoices (received from RK-II-3 creditors)	RK-II-3	See learning activities under RK-II-2
RK-II-4	Cash Payments Journal	RK-II-4	Use overhead to demonstrate cash payments journal. Students will prepare checks for balances in accounts payable subsidiary ledgers. They will also record transactions in cash payments journal. (Don't forget cash discounts.)
RK-II-5	Accounts Receivable Sales Journal General Journal General Ledger Sales Sales Tax Payable Accounts Receivable Subsidiary ledger Schedule of Accounts Sales Returns and Allowances	RK-II-5	See activities suggested under RK-II-2.
RK-II-6	Cash Receipts Journal	RK-II-6	Use overhead to demonstrate cash receipts journal. Students will record checks received in RK-II-4 in cash receipts journal.

NAME Michael Allen

Week Ending June 13, 19--

Days	Regular				Other		Hours	Earnings
	In	Out	In	Out	In	Out		
Mon.	7:56	12:00	12:58	5:01			8	2880
Tues.	7:57	12:01	12:59	5:00			8	28 80
Wed.			12:57	5:01	6:00	9:02	7	25.20
Thurs.	7:58	12:00	12:59	5:00			8	28.80
Fri.	7:57	12:01	12:58	5:02			8	28.80
Sat.								
Sun.								

Extra Hours Approved

	Hours	Rate	Earnings
Regular	39	3.60	140.40
Overtime	-0-		
Total Hours	39	Gross Earnings	140.40

F. Cutler
Supervisor

NAME Rhonda Johnson

Week Ending June 13, 19--

Days	Regular				Other		Hours	Earnings
	In	Out	In	Out	In	Out		
Mon.	7:55	12:00	12:55	5:05			8	32.80
Tues.	7:56	12:03	12:57	5:10			8	32.80
Wed.	7:55	12:01	12:55	5:02	6:00	8:01	10	45.10
Thurs.	7:57	12:02	12:56	5:05			8	32.80
Fri.	7:58	12:01	12:57	5:01	6:00	8:02	10	45.10
Sat.								
Sun.								

Extra Hours Approved

	Hours	Rate	Earnings
Regular	40	4.10	164.00
Overtime	4	6.15	24.60
Total Hours	44	Gross Earnings	188.60

F. Cutler
Supervisor

PAYROLL REGISTER

Week Ending ________________ 19--

Employee Data		Marital Status	Exemp.		Earnings			Deductions					Net Pay	
o.	Name				Regular	Overtime	Total	Income Tax	FICA Tax	Insurance Premiums	Other	Total	Amount	Check No.

RK-11-1

PAYROLL TEST

Directions: Complete

1. Payroll Register
2. Employee's Earnings Records
3. Payroll Checks
4. Journal Entries
5. Posting to General Ledger

Use Current State and Fede Tax Tables

Answer Key Not Provided

PAYROLL TEST MEASUREMENT--80%

15%--Gross earnings agree with time cards

15%--Gross = Deductions + Net Amount

15%--Employee's Earnings Records agree with checks

15%--Total earnings for week + Previous year-to-date earnings = Current year-to-date earnings

20%--Payroll Register tota journalized

20%--General ledger accoun posted

RK-11-1 (Payroll Test Forms)

WEEK ENDING	DATE PAID	HOURS	Regular	Overtime	Commissions	Total	Income Tax	FICA Tax	Group Insurance	Total	Amount	Check No.
			EARNINGS				DEDUCTIONS				NET PAY	

EMPLOYEE PAY STATEMENT (Detatch and retain for your own records)

US ENTERPRISE, INC.
Anytown, AZ 85310

PAYROLL CHECK

No. ________

21-293
1038

________________ 19 ____

Pay to the order of ________________________ $ ________

________________________________ Dollars

ANYTOWN STATE BANK
Anytown, AZ 85310

____
Authorized Signature

Sample only

WEEK ENDING	DATE PAID	HOURS	Regular	Overtime	Commissions	Total	Income Tax	FICA Tax	Group Insurance	Total	Amount	Check No.
			EARNINGS				DEDUCTIONS				NET PAY	

EMPLOYEE PAY STATEMENT (Detatch and retain for your own records)

US ENTERPRISE, INC.
Anytown, AZ 85310

PAYROLL CHECK

No. ________

21-293
1038

________________ 19 ____

Pay to the order of ________________________ $ ________

________________________________ Dollars

ANYTOWN STATE BANK
Anytown, AZ 85310

____
Authorized Signature

Sample only

CASH PAYMENTS JOURNAL

Page ____________

Date	Account Debited	Explanation	Check No.	Post Ref.	Amount

RK-11-1 (Payroll Test Forms)

EMPLOYEE EARNINGS RECORD

Fiscal Year Ended 12-31---

Name Michael Allen

Marital Status Single

Social Security No. 453-35-3580

No. of Exemptions 1

	EARNINGS			DEDUCTIONS						
Week Ending	Regular	Overtime	Total	Income Tax	FICA Tax	Insurance	Other	Total	Net Pay	Year-To-Date
										4,538.85
Year-To-Date Totals										

EMPLOYEE EARNINGS RECORD

Fiscal Year Ended 12-31-

Name Rhonda Johnson

Marital Status Married

Social Security No. 350-38-2986

No. of Exemptions 3

	EARNINGS			DEDUCTIONS						
Week Ending	Regular	Overtime	Total	Income Tax	FICA Tax	Insurance	Other	Total	Net Pay	Year-To-Date
										5,100.08
Year-To-Date Totals										

RK-11-2

ACCOUNTS PAYABLE CRITERION-REFERENCED TEST

Directions: Journalize and post the following transactions.

1. June 15, 19--. Purchased merchandise on account from Valley Office Supplies, $75, Purchase Invoice No. 2401.
2. June 25, 19--. Returned unordered merchandise to Valley Office Supplies, $14, Credit Memo 171.
3. June 29, 19--. Purchased merchandise on account from CBM, $350, Purchase Invoice No. 2402.

PURCHASES JOURNAL

Page 1

Date	Creditor's Name	Terms	Invoice No.	Amount
19-- June 15	Valley Office Supplies		2401	75.00
29	CBM		2402	350.00
				425.00
				(21)(51)

GENERAL JOURNAL

PAGE 1

DATE		ACCOUNT TITLE	Post. Ref.	DEBIT	CREDIT
19-- June	25	Accounts Payable-Valley Office	21/✓	14 00	
		Purchases Returns + Allowances	51.1		14 00
		Credit Memo 171			

RK-11-2 (Accounts Payable Test Forms)

OUNT Accounts Payable ACCOUNT No. 21

te	Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
30		P1		425 00		425 00
25		J1	14 00			411 00

OUNT Purchases ACCOUNT No. 51

te	Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
30		P1	425 00		425 00	

OUNT Purchase Returns & Allowances ACCOUNT No. 51.1

te	Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
25		J1		14 00		14 00

NAME Valley Office Supplies

ADDRESS

Date		Item	P. R.	Debit	Credit	Credit Bal.
19 June	15		P1		75 00	75 00
	25		1	14 00		61 00

NAME CBM

ADDRESS

Date		Item	P. R.	Debit	Credit	Credit Bal.
19 June	29		P1		350 00	350 00

Schedule of Accounts Payable
US Enterprise, Inc.
June 30, 19--

CBM	350 00	
Valley Office Supplies	61 00	
Total		411 00

RK-II-2

ACCOUNTS PAYABLE CRITERION REFERENCED MEASUREMENT

Competency Standard--80%

Transactions were recorded in proper journal

General Journal—20%
Purchases Journal—20%

Journal entries posted correctly

General Ledger--20%
Subsidiary Ledger--20%

Schedule of Accounts payable agrees with General Ledger Account (Accounts Payable)--20%

RK-II-3 No criterion instrument given. Suggested measurement is to give students a list of invoice transactions, including terms, and have them check extensions, calculate discounts, and identify due date.

RK-11-4

CASH PAYMENTS CRITERION REFERENCED TEST

Directions: On due date, write checks for the following invoices, journalize, and post.

1. May 14, 19--, purchased merchandise amounting to $725 from S. S. King Co., invoice No. 444, terms net, 15 days.
2. May 18, 19--, purchased merchandise amounting to $435 from Sunset Enterprise, invoice No. 3842, terms 2/10, n/30.

No. 101 Date 5/29 19-- $725.00
To S. S. King Co.
For Inv. No 444

BAL BRO'T FOR'D		
DEPOSITED ☐☐ 19 (DATE)		
TOTAL		
AMT THIS CHECK	725	00
BAL CAR'D FOR'D		

US Enterprise, Inc.
Anytown, AZ
No. 101
May 29 19--
64-618/612
Pay to the order of S. S. King Co. $725.00
Seven Hundred Twenty-five and no/100 Dollars
ANYTOWN BANK
Anytown, AZ

No. 100 Date 5/28 19-- $426.30
To Sunset Enterprise
For Inv. No. 3842
Disc. 8.70

BAL BRO'T FOR'D		
DEPOSITED ☐☐ 19 (DATE)		
TOTAL		
AMT THIS CHECK	426	30
BAL CAR'D FOR'D		

US Enterprise, Inc.
Anytown, AZ
No. 100
May 28 19--
64-618/612
Pay to the order of Sunset Enterprise $426.30
Four Hundred Twenty-six and 30/100 Dollars
ANYTOWN BANK
Anytown, AZ

CASH PAYMENTS JOURNAL

PAGE 13

	DATE 19--		ACCOUNT TITLE	CHECK No.	POST. REF.	1 GENERAL DEBIT	2 GENERAL CREDIT	3 ACCOUNTS PAYABLE DEBIT	4 PURCHASES DISCOUNT CREDIT	5 CASH CREDIT	
1	May	28	Sunset Enterprise	100	✓			435 00	8 70	426 30	1
2		29	S.S. King Co.	101	✓			725 00		725 00	2
3								1160 00	8 70	1151 30	3
4											4
5								(211)	(511.1)	(11)	5
6								✓	✓	✓	6
7											7
8											8
9											9
10											10

RK-11-4 (Cash Payment Test Forms)

COUNT *Cash* ACCOUNT No. *11*

Date		Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
y	*1*					*5676 25*	
	31		*CP13*		*1151 30*	*3424 95*	

COUNT *Accounts Payable* ACCOUNT No. *21*

Date		Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
ay							*10850 31*
	31		*CP13*	*1160 00*			*9690 31*

COUNT *Purchases Discount* ACCOUNT No. *51-1*

Date		Item	Post. Ref.	Debit	Credit	Balance Debit	Balance Credit
ay	*31*		*CP13*		*8 70*		*8 70*

NAME *S. S. King Company*
ADDRESS *2450 Sunset Blvd.*

Date		Item	P. R.	Debit	Credit	Credit Bal.
May	*14*	*Inv No. 444*			*725 00*	*725 00*
	29		*CP13*	*725 00*		*—*

NAME *Sunset Enterprise*
ADDRESS *1580 - 18th Street*

Date		Item	P. R.	Debit	Credit	Credit Bal.
May	*18*	*Inv. No. 3842*			*435 00*	*435 00*
	28		*CP13*	*435 00*		*—*

CASH PAYMENTS MEASUREMENT

Competency Standard--80%

20%--Check is completed with 100 percent accuracy--check stub is complete; check stub amount agrees with check amount; written amount agrees with amount in numbers.
20%--Journal entries agree with checks.
20%--General ledger accounts--cash and accounts payable--posted correctly.
20%--General ledger subsidiary accounts posted correctly.
20%--Any cash discount deducted from invoice total is properly recorded in cash payments journal.

RK-11-5 No criterion instrument given. Suggested measurement is to use same type of test suggested for RK-11-2, Accounts Payable.

RK-11-6 No criterion instrument given. Suggested measurement is to use same type of test suggested for RK-11-4.

RECORD KEEPING - LEVEL III

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
		Payroll—Level III	
RK-III-1	Given tax forms and needed payroll records	the student will prepare monthly, quarterly, and end-of-year tax reports	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RK-III-1	Payroll Taxes Form 941—Employer's Quarterly Tax Return Form W-2—Wage and Tax Statement Form W-3—Transmittal of Income and Tax Statements	RK-III-1	Use transparencies to demonstrate how to complete various tax forms.

RK-III-1 No criterion instrument given. Suggested measurement is to provide the student with completed payroll records, general ledger accounts, and any necessary tax forms. Have the student progress from monthly to quarterly to end-of-year reports. Totals on forms should agree 100 percent with totals taken from payroll and general ledger accounts.

COMPETENCY PROFILE
for
RECORD KEEPING

Student Name ______________________

Start Date ______________________

Completion Date ______________________

		Qualified	Not Qualified
RK-I-1	**Banking**		
	Deposit Slips		
	Checks		
	Payments--writing checks		
	Receipts--endorsements		
RK-I-2	Reconciliation		
RK-I-3	**Payroll**		
	Time Cards		
	Accounts Payable		
RK-I-4	Purchase Requisitions		
RK-I-5	Purchase Orders		
	Trade Discounts		
	Sales Tax		
	Extensions		
RK-I-6	**Accounts Receivable**		
	Sales Tax		
	Extensions		
RK-II-1	**Payroll**		
	Employee's Earnings Record		
	Payroll Register		

		Qualified	Not Qualified
RK-II-2	**Accounts Payable**		
	Journal Entries		
	Posting		
	Schedule of Accounts Payable		
RK-II-3	Invoices		
	Extensions		
	Cash Discounts		
RK-II-4	Cash Payments		
	Journal Entries		
	Checks		
	Posting		
	General		
	Subsidiary		
RK-II-5	**Accounts Receivable**		
	Journal Entries		
	Posting		
	Schedule of Accounts Receivable		
RK-II-6	Cash Receipts		
	Journal Entries		
	Posting		
	General Ledger		
	Subsidiary Ledger		
RK-III-1	**Payroll Taxes**		
	Monthly		
	Quarterly		
	End-of-year		

CERTIFICATE OF COMPETENCY AWARDED ______________________
Date Initials

All competencies required for a Certificate of Competency.

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

RECORD KEEPING

Completion Date ____________ School ______________________________

Instructor ______________________________

LEVEL III

_______ Banking (Deposits, Checks, Reconciliations)

_______ Payroll (Computing, Journalizing, Posting, Employees' Earnings Record, Tax Forms)

_______ Journals (General, Accounts Payable, Accounts Receivable, Cash Disbursements, Cash Receipts)

_______ General Ledgers (Limited Number of Accounts)

_______ General Ledgers (Subsidiary--A/R and A/P)

_______ Petty Cash

_______ Inventory

SHORTHAND

DESCRIPTION

Shorthand is one important aspect of input systems and should be included in the curriculum so that stenographers, secretaries, and other businesspersons will be capable of working efficiently in any system. Regardless of the input system, transcription is the output; so increased emphasis is needed on the teaching of transcription skills such as punctuation, vocabulary, grammar, typewriting, listening, and proofreading.

Despite adverse propaganda, shorthand has stood the test of time. Many jobs are available which require competency in shorthand, an entry-level skill which often leads to administrative careers.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Stenographer I, Stenographer II, and Corresponding Secretary.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
History	Theory Principles	Dictation for Speed Building	Dictation for Speed Building
Opportunities in Shorthand	Reading	Dictation for Transcription	Dictation for Transcription
Energy Conservation	Dictation for Speed Building	Introduction to Office Style Dictation	Office Style Dictation
Theory Principles	Dictation for Transcription	Preparation for Employment	Preparation for Employment
Brief Forms		Recommendations	Letter Composition
Reading			
Dictation and Transcription			
Motivation			

SHORTHAND - LEVEL I

COMPETENCY GOAL

At the conclusion of the presentation of all theory principles, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
S-I-1	Given 50 theory words written in shorthand	the student will transcribe (using a dictionary if desired)	with 80 percent accuracy within 15 minutes.
	Given 50 theory words typed or written in longhand	the student will construct shorthand outlines	with 80 percent accuracy within 20 minutes.
S-I-2	Given 50 brief forms* dictated at the rate of one every 5 seconds	the student will transcribe without the use of a dictionary	with 95 percent accuracy within 10 minutes.
S-I-3	Given a 30-second timing on material correlated with, or taken from a previous lesson	the student will read	not less than 40 words for 1/2 minutes.
S-I-4	Given dictation for 3 minutes at a minimum of 40 words a minute on practiced material with the textbook open	the student will transcribe from shorthand notes with the textbook closed	with 95 percent accuracy within 30 minutes.** (This objective must be met at least two times.)

Note: Level I testing should be done after theory has been completed.

*Sometimes known as speed forms or by other labels.

**Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	History		Give a short history of shorthand and the advantages of the system taught in your school curriculum.
	Opportunities in Shorthand		Emphasize jobs available which require shorthand, higher wages paid to shorthand writers, the opportunities for advancement in the business world. Hint: Call employment agencies in your community or do a community sampling. Former students provide an excellent source. Check to see that students have had or are currently enrolled in typing.
	● Energy Conservation		● Emphasize the saving of energy by correct use of equipment and physical facilities.
S-I-1	Theory Principles Teaching Suggestions Classroom Homework	S-I-1	Have students write phonetic spellings for words dictated by the teacher.+ Teacher demonstrates all new theory principles using chalkboard or overhead.+ Hint: Lines drawn on a wet chalkboard will last several days. Have rapid, repetitive drill on theory words and phrases listed on chalkboard, overhead, or controlled reader.

+The use of this symbol indicates that not all systems recommend this activity.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Theory Principles (Continued)		Have students do dry penning* of theory words and phrases using textbooks.
			Practice writing theory words and phrases using textbooks, chalkboard, or controlled reader.
			Students practice from teacher or taped dictation of theory words and phrases. When students transcribe these, a dictionary may or may not be used to verify spelling.
			Theory words and phrases should be part of homework practice.
			Students should read large amounts of connected matter which emphasize theory principles.
			Review constantly theory principles previously introduced using word lists and reading matter.
S-I-2	Brief Forms Teaching Suggestions Classroom Homework	S-I-2	Teacher demonstrates brief forms at chalkboard or overhead.
			Do rapid, repetitive drill on brief forms listed on chalkboard, overhead, controlled reader, or charts. Students should write shorthand outlines on charts that list all the brief form words. Teacher then dictates the brief forms at increased speeds while students dry pen.
			Hint: Brief forms should not be spelled.
			Students may dry pen and/or write dictated brief forms using textbooks or charts.

*Writing may start with dry penning. Dry penning is a process whereby the student turns the pen to the cap end and places it directly under the textbook outline (the outline should be in full view) and copies the material as the teacher dictates it.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Brief Forms (Continued)		Prepare flash cards showing shorthand outline on one side and its key on the other. Assign the practice of brief forms as a part of homework. Hint: Use accordion or pleat sheet method for drill. When using this method, students write brief forms in shorthand down the left side of lined composition paper and transcribe next to the outline. The paper is then folded back so that only the longhand is visible. Students then write the shorthand outline for the longhand. This process is continued across the page. The paper is folded back each time so that only one column is visible. Brief forms should be tested frequently. No transcriptions should be permitted on these tests until all brief forms to be tested have been dictated. Both the typewritten or the longhand spelling (without the use of a dictionary) and the shorthand outline should be correct. Short paragraphs "loaded" with brief forms provide intensive review. Hint: High accuracy standard should be required. Students should be tested until the required standard is met.
S-I-3	Reading Teaching Suggestion Classroom Homework	S-I-3	Teacher previews next lesson by spelling and reading while students dry pen. Use group concerted reading and/or spelling and reading of previewed lesson.+

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reading (Continued)		

Reading in class of next homework assignment helps students in the early stages.

Hint: If spelling is used, it should be continued for the first several weeks and continued thereafter on any word where difficulty is experienced.

Do individual reading and/or spelling and reading of homework in class. In the early stages most reading should not be done individually.

To encourage students' reading practice at home, it is necessary to spend a limited amount of classtime each day in reading previously completed homework.

Read with partners. A chart or score may be kept; partners may read to each other while teacher takes roll each day.

Read from controlled reader.

Read large amounts of connected matter as homework.

Hint: Students should be encouraged to read the homework assignment three times before writing it.

Teacher sets a reading time goal for the entire lesson or for each letter assignment as homework. Charts may be duplicated listing the number of words in each letter in the lessons of each chapter. Students add numbers together and divide by their time for reading speed.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-I-4	Dictation and Transcription Teaching Suggestions Classroom Homework	S-I-4	Dictation may start with student dry penning from textbook connected matter. Before typed transcription of dictation is tested, the proper test is the 3 to 5 minute transcription of material selected from the assignments previously completed in the textbook. The net speed is determined by dividing the number of words correctly transcribed by the number of minutes or by dividing the number of words transcribed allowing a maximum error limit. These tests should be used in the early stages for guidance purposes only. Once writing has been introduced, most of the class time should be spent in dictation. Take dictation (with textbook open) from tapes correlated with connected matter previously prepared as homework. Tapes may be used in a shorthand lab as a valuable teaching aid. Advantages include: individualized dictation speed, extended boundaries for fast learners, unlimited repetitive dicatation, vocabulary building, teachers freed to work with small groups, use of variety of material from easy to difficult, variety of dictation voices, testing when students are ready, make-up work, outside class practice, remedial practice, and transcription exercises. Hint: In the first stage of building speed, the entire class should first read aloud the letter to be dictated. Always require pen and shorthand notebook. The notebook can be divided into fourths. Use rubber bands to keep used pages separate. Write on only one side of sheets throughout notebook and then turn book over and write on the other side. Date first page of each day's notes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation and Transcription (Continued)		Take dictation from teacher at speeds of at least 40-50-60 words a minute of previously prepared homework starting with words, thought units, and sentences and proceed to durations of 1/2, 1, 2, and 3 minutes. Other speed variations may be used.
			Hint: Whenever half of the class can take dictation at a speed with ease, dictation at that rate should be eliminated. For testing purposes, however, the low rate may be included.
			Students leave textbooks open while taking dictation and refer to them only when needed. However, some effort should be made to write with books closed. Teacher should require some reading back of this dictation practice. Reading back own notes calls more attention to legibility. Students should be cautioned not to write any longhand in plate notes.
			If teacher desires to check the mechanics such as punctuation on the timed transcription of connected matter from the textbook, a separate grade should be given.
			Activities involving the use of spelling, punctuation, vocabulary, and proofreading may include teacher testing, pre-transcription training, workbooks, daily drills, and worksheets.
			Hint: Daily Homework is essential to the development of shorthand competency. In homework writing assignments, the opportunity may be given for students to write the shorthand outlines from longhand print.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation and Transcription (Continued)		HINT: Students should be taught self-dictation and to place punctuation in homework with red pen. ● The use of two notebooks for homework to be handed in alternately saves paper and allows ease in checking homework. A third notebook should be used for classwork.
	Motivation Devices		Team Events: Divide class into 2 teams. A theory word is dictated, and a member from each team writes the shorthand outline on the board. A point is given for the first correctly written outline. Teacher calls on student to spell in shorthand words that have been covered in class. For each correct word spelled in shorthand, the team scores a point. (This could be used as an individual game by having the class stand in a single line, and the person misspelling the word should either sit down or move to the end of the line.) Partnership Event: A theory word is dictated. Taking turns each student writes the shorthand outline. Depending on the game chosen, the student writing a correct outline could place an "x" or "o" in Tic-Tac-Toe, draws a part of a stick figure representing a hangman, or advances in a sport area such as a ball diamond.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation and Transcription (Continued)		Individual Events: Write word beginning or ending on board. Students write in shorthand as many words as they can using the beginning or ending. Prepare bingo cards with different theory words for a chapter or section on each card. Prepare a separate slip for each word and follow bingo rules. This can also be used with brief forms. Write jumbled letters which, if arranged correctly, will form words. Students write the correct word in both longhand and shorthand. The student with the most shorthand and longhand words wins. Teacher may also use holiday terms or song titles written in shorthand to be transcribed. Name tags depicting a season (ghosts, Christmas trees, or hearts) may be prepared on which the students write their names and/or a message in shorthand. Teacher may contact other shorthand teachers to exchange names of students for pen pals. Many attractive bulletin boards may be purchased, and many ideas for teacher-made bulletin boards can be found in teacher's manuals.

LEVEL I SHORTHAND CRITERION-REFERENCED MEASUREMENTS

S-I-1 Theory Test

At the conclusion of the presentation of all the theory principles, test this competency by writing in shorthand 50 theory words previously studied that demonstrate the different applications of the principles of theory. The student must transcribe the words either in longhand or at the typewriter with 80 percent accuracy within 15 minutes. Student may use a dictionary (not shorthand) to verify spelling.

At the conclusion of the presentation of all the theory principles, test the remainder of this competency by typing 50 theory words previously studied that demonstrate the different applications of the principles of theory. The student must write the shorthand outlines with 80 percent accuracy within 20 minutes. Proportion must be consistent thoughout the outlines.

S-I-2 Brief Form Test

At the conclusion of the presentation of all the brief forms, select 50 brief forms. Caution the students to write only shorthand outlines (no longhand). Dictate 1 word every 5 seconds (pronounce each word 2 times during the 5 seconds). After the dictation, quickly check to be certain that no longhand appears on the student's paper. The student transcribes without the use of a dictionary with 95 percent accuracy within 15 minutes. Transcription may be either in longhand or typed. Both the ouline and transcription must be accurate to be considered correct.

RECOMMENDATION: Using lined paper, the student should write one outline per line and transcribe each outline next to the shorthand outline.

S-I-3 Reading Test

Time the student for 30 seconds reading from shorthand connected matter from a lesson previously studied. At least 40 words should be read within the 30 seconds. Student must spell words in shorthand before you prompt. Reading speed per minute would be double the 1/2-minute test speed.

S-I-4 Dictation and Transcription Test

Give 3 minutes of dictation of practiced material no lower than 40 words a minute. Student should take the dictation with the textbook open, then close the textbook and transcribe from the shorthand notes with 95 percent accuracy within 30 minutes. A dictionary (not shorthand) may be used to verify spelling. This objective must be met at least 2 times.

COMPETENCY PROFILE
FOR
SHORTHAND

LEVEL I

Student Name______________________________

Start Date________________________

Completion Date________________________

		(Date/Initials)	
		QUALIFIED	NOT QUALIFIED
S-I-1	Transcription of theory written in shorthand (50 words, 80 percent accuracy, within 15 minutes)		
	Shorthand outlines for theory written in longhand (50 words, 80 percent accuracy, within 20 minutes)		
S-I-2	Brief Forms (50 words dictated, 1 every 5 seconds, 45 percent accuracy within 15 minutes)		
S-I-3	Reading (not less than 40 words for 1/2 minute)		
S-I-4	Dictation for 3 minutes at 40 wam (with book open) and transcription (with book closed) within 30 minutes with 95 percent accuracy.	1	
		2	

CERTIFICATE OF COMPETENCY AWARDED______________________________
Date Initials

ALL competencies required for Certificate of Competency.

SHORTHAND - LEVEL II

COMPETENCY GOAL

At the conclusion of the presentation of all theory principles, the student when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
S-II-1	Given at least 50 dictated brief forms, brief form derivatives, phrases, and/or words previously studied.	the student will transcribe	with 95 percent accuracy within 15 minutes.
S-II-2	Given a 30-second timing using familiar textbook plates	the student will read	not less than 60 correct words during the 30 seconds.
S-II-3	Given a 30-second timing using homework notes	the student will read	not less than 40 correct words during the 30 seconds.
	Given dictation (paragraphs dictated) for 3 minutes at 60 words a minute on unpreviewed new matter	the student will transcribe	with at least 95 percent accuracy within 30 minutes* (This objective must be met at least three times.)
S-II-4	Given a short business letter (paragraphs dictated at 50 words a minute)	the student will transcribe in block style	with no more than three errors within 15 minutes.

*Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-II-1	Theory Principles Brief Forms and Derivatives Phrases	S-II-1	Review the major principles of the shorthand system by having students drill to develop word and phrase building power.
			Teacher presents word and phrase drills on the chalkboard or overhead projector and students recite in concert.
			Have individual students read back from the lists in the book or from homework practice.
			Time the students' reading from theory charts or drills.
			Have students read and/or copy review lists for homework.
			Have students dry pen brief form charts at increasing rates of speed (see Level I, Brief Forms).
			Dictate brief forms, 1 every 2 seconds, while students write them.
			Have students play word-ending and word-beginning games on board (see Level I, Motivation).
			Have students drill on brief form derivatives. Use tape or live dictation.
			Hint: Teacher should prepare a word list of brief form derivatives.
	Most Used Words		Have students drill on 1,500 most frequently used words in business letters.
			Give periodic theory tests by dictating words that illustrate theory principles.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Most Used Words (Continued)		Give brief form review or test at least once a week. Hint: Encourage students to pass brief form test with 100 percent accuracy at least once during this level. Students should hand in for teacher to correct. Otherwise, students should check their own papers and hand them in the next day. Each brief form should be dictated every 2.5 seconds.
S-II-2	Reading Classroom Homework	S-II-2	Use the same types of activities as those recommended for Level I; scales should be raised. Students should be assigned and given reading tests on their homework notes in addition to those from book plates. For development of reading speed, have students read through their written homework notes several hours after they have prepared their lesson.
S-II-3	Dictation for Speed Building	S-II-3	It is recommended that the students spend as much time as possible taking dictation during this level; easy matter should be used, paragraphs should be dictated, and speed should be forced constantly. Hint: Short takes build speed faster than long ones. Teacher should announce the speed before dictating. Endurance is developed by the rate of speed rather than the amount of time.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation for Speed Building (Continued)		Teachers should refer to teacher's manuals or textbook for a variety of different dictation plans. From these, the teacher should select one basic plan which should include the following elements:
	Elements		Preview Teacher places preview of words and phrases on the board. Hint: As the preview is placed on the board or overhead, students may write the preview in the air with large writing motions. Students may be given preview words to practice as homework the night before. All new matter used for speed development should be previewed; approximately 10 outlines per 100 words. Give students an opportunity to ask for additional shorthand outlines after dictating material and place requested outlines on the board or overhead projector. When using the ascending method, it is recommended that the first dictation speed be within the reach of the majority of the class. Reading Back Reading back from notes is preferred to transcribing when the goal is speed building because it saves time, it clears up writing problems, and it provides relaxation between different speed levels.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation for Speedbuilding (Continued)		Hint: Ask if students are able to keep up. Base the next level of dictation on their response.
			Redictation
			Redictate material at higher rates. Since repetition is very important, dictate the material at least 3 times (4 or more times if letters are short). In-between rates (10 word increments) are recommended.
			Redictation For Control
			Redictate material at a rate of about 10 words faster than the initial speed to restore control.
	Drills		To allow for individual differences, give 2 speed takes at the level at which most students are working and 1 at each of the other speeds. Each student takes all speeds and transcribes at least 1. Start with 1-minute timings. As soon as 1/4 to 1/3 of the class has passed these 1-minute timings, increase time to 2 minutes. Start 3-minute timings as soon as the same percentage of students have passed the 2-minute timings. Some teachers prefer to start directly on 3-minute timings.
			Have students dry pen for speed building. The teacher may either dictate material of 100 words, or the students may write a homework letter. Have students write on every other line. If the material is dictated, it is untimed and given at a rate slow enough that every student can get the dictation.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation for Speedbuilding (Continued)		After the dictation is completed, all questioned outlines are put on the board as well as phrases. Student turns the pen to the cap end and places it on the blank line. Timed dictation is begun and is repeated at increasing speeds. (At the beginning of Level II, dictation for dry penning should begin at 80 and may be increased to 140 words a minute. By completion of Level II, the speed may be increased from 120 to 200 words a minute). After the top level of dictation has been given, the student then writes on the blank lines as the teacher dictates at the rate of about 10 words faster than the initial speed to restore control. After this dictation, the student turns the page and writes at the initial speed without reference to the shorthand notes.
	Testing		Speed takes for grades should be dictated on new matter without a preview and transcribed with 95 percent accuracy within a stated amount of time. Hint: Students may keep individual records of speed takes they pass by circling the applicable speed, using a chart on which each speed is listed 3 times. A teacher record may list all student names at the left and each speed 3 times across the top. As students pass a particular speed, the teacher records the number of errors made in the appropriate space. Individual folders may be kept for the speed takes passed by each student. Once students pass 3 takes at a given speed, the next higher speed should be required. Although three copies of a given speed are necessary to esablish competency, takes at higher speeds may be substituted.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Testing (Continued)		Hint: Speed increases are the greatest just after theory has been learned. The higher the speed attained, the more difficult it is for the student to make further gains. Teacher may give dictation to be used to complete "fill-ins." For the best utilization of time, teachers have found that during the speed building sessions students have more time for speed building if they are occasionally required to use "fill-ins." Dictation is given at the beginning of the period, and at the end of the period the transcript is given to the student with blanks to be filled in from student notes. Dictation for 3 minutes usually requires no more than 5 minutes to complete. Several methods may be used to make grading easier for 3-minute speed tests. Paste your speed take copy on a 5" x 8" card. After testing, sort all the like speeds together and paper clip them to the speed take card. Date the back of the card and check to see that students have typed the date on their papers. The class may be divided into groups, each group having a designated reader. Another method is to have students make a carbon copy to hand in. They can grade their own original from duplicated copies of the speed take.
	Motivational Devices		Teacher may use motivational devices such as bulletin boards and speed charts to record the speed of the students and to create competition. Award programs and magazines from the various textbook companies are also excellent motivational devices.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Motivational Devices (Continued)		Hint: If left-handed students use the same writing motion they have acquired for the writing of longhand, they will not have problems writing shorthand. These students may try writing in the right-hand column first and then move to the left. "Upside down" left-handers may try writing from the top edge of an opened notebook toward the spiral rather than away from the spiral.
S-II-4	Dictation for Transcription Aids Vocabulary	S-II-4	Have students study definitions of business vocabulary contained in lessons. Hint: When students encounter these words while writing homework, they may be instructed to place the definition inside parenthesis by the word. Ask individual students to define words during reading back of dictation. Keep a list of these vocabulary words and occasionally give short written tests from this list. Students may be instructed to write definitions in shorthand on the test. Some shorthand systems have transparencies for this purpose.
	Punctuation		Pretest punctuation for diagnostic purposes and review by using comma usage covered in Level I. Shorthand sentences which require application of the rules, letters with commas omitted, or prepared worksheets are helpful as well as teacher or company prepared overhead transparencies. Present additional punctuation rules to class. Have students apply punctuation and state the rule when reading back shorthand notes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Spelling		Make a list of spelling words from lessons if textbook does not supply such a list. Have students learn these and add to the list any misspelled words found in their transcriptions. A 5" x 8" card can be used by each student for personal "spelling demons." Ask students to spell words when they are reading back from either dictation or homework. Students may practice typing misspelled words. Occasionally dictate a short quiz of about ten words from the list.
	Typing		Teacher should check typing skill by giving short timings on straight copy, doing short drills, by timing numbers and symbols, and by dictating short letters to students at the typewriter.
	Introduction to Transcription Familiar Plates		Have students transcribe from familiar shorthand plates. Before they transcribe, have them read the material aloud several times and supply punctuation. Ask for questions on any problems that relate to spelling or punctuation. Instruct them to use a 70-space line and to double space. After students have been transcribing from the shorthand plates for a day or two, the timing concept should be introduced. Timings may be for 2 or 3 minutes. Students should proofread and circle errors. Compare straight-copy timings to those done from the shorthand plates of same material. Students should transcribe in timed style at 1/2 their straight copy rate. Typed transcripts from shorthand plates should not be continued for more than a few days before starting transcription from dictation.+

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Homework Notes		Give 1-minute timings from student's shorthand homework notes after reading each letter aloud in class to avoid problems in transcription. Encourage the use of available reference materials to assist with accurate transcriptions.
	Live Dictation Familiar Material		Dictate a short familiar letter to the class. Have the students read the letter in concert from their notes before transcribing. Strive to have the class complete a letter in 5 minutes or less when typing from familiar material. After the students have become accustomed to transcribing from their own notes, the teacher should introduce the letter style the class is to use. (Block is the style most frequently used.) Dictation should be from practiced or related material and the paragraphs should be dictated. Letters should be dictated to students at about 20 words a minute below the average 3-minute dictation speed.
	Unfamiliar Material		Dictate unfamiliar material. Have student transcribe from shorthand notes in letter style. After several days when students have become accustomed to taking dictation from unfamiliar material, demonstrate correction methods and instruct students to correct errors. Don't gear all dictation to the average or slow students. Dictate several letters at higher speeds, having students transcribe first the letters they "got" at the highest speed.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Live Dictation Unfamiliar Material (Continued)		Hint: After transcription has been introduced, it is suggested that students spend the first 10 minutes of class transcribing from their homework while teacher takes care of administrative duties.
●	Conservation of Materials and Energy	●	Conservation Suggestions: Students should realize how costly a letter is today and the importance of getting it "right" the first time.

SHORTHAND CRITERION-REFERENCED TESTS

LEVEL II

S-II-1 BRIEF FORM, THEORY, AND PHRASE TESTS.

Select at least 50 dictated brief forms, brief-form derivatives, phrases, and/or words previously studied which represent the theory principles and the most-used business terms. Student must transcribe the words either in longhand or at the typewriter with 95 percent accuracy within 15 minutes. Student may use a dictionary (not shorthand) to verify spelling.

S-II-2 READING TEST, BOOK PLATES

Time the student for 30 seconds reading from shorthand connected matter from a lesson previously studied. At least 60 correct words should be read within the 30 seconds. Subtract from the total words read, 1 for each error or word prompted.

READING TEST, HOMEWORK NOTES

Time the student for 30 seconds, reading from shorthand homework connected-matter notes from a lesson previously written. Select notes from no more than 3 days prior. At least 40 correct words should be read within the 30 seconds. Subtract from the total words read, 1 for each error or word prompted.

Recommendation: By having students date daily homework, it is readily accessible for such a test.

S-II-3 SPEED TESTS

Give dictation for 3 minutes at 60 words a minute on unpreviewed new matter. Select material that has a high frequency of the most-used words, brief forms, and a syllabic intensity of 1.4 to 1.6. Have student transcribe the speed take within 30 minutes in double-spaced form with a 70-space line and 5-space paragraph indention. All errors must be corrected. A dictionary may be used to verify spelling. The student should type name, date, and speed dictated at the top of the paper. The student must pass 3 speed tests at 60 words with 95 percent accuracy to meet this objective. Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

S-II-4 TRANSCRIPTION OF BUSINESS LETTER

Dictate a short business letter approximately 120 words in length at 50 words a minute. Have the student transcribe the letter using block style. A dictionary may be used to verify the spelling. Give an inside address and the dictator's name to be used in transcription. The criteria for evaluating the letter are:

1. The thought of the dictation is followed very closely. Minor changes from the dictation are permitted provided they do not change the original thought of the dictator.
2. Letter looks reasonably neat. Margins should be fairly even.
3. No omissions such as an entire clause or sentence in the body of the letter, the date, salutation, or the complimentary close.
4. Three uncorrected errors in typing, spelling, punctuation, syllabication, or poorly done erasures will be allowed for minimum competency.

COMPETENCY PROFILE
FOR
SHORTHAND

LEVEL II

Student Name________________________________

Start Date__________________________

Completion Date______________________

(Date/Initials)

		QUALIFIED	NOT QUALIFIED
S-II-1	Dictation and transcription of theory (50 words, 95 percent accuracy, within 15 minutes)		
S-II-2	Reading from textbook plates (not less than 60 correct words within 30 seconds)		
	Reading from homework notes (not less than 40 correct words within 30 seconds)		
S-II-3	Transcription from dictation (paragraphs dictated) given for 3 minutes at 60 words a minute on unpreviewed new matter with at least 95 percent accuracy within 30 minutes. Objective to be met 3 times.	1 2 3	
S-II-4	Transcription from dictation of a short business letter (paragraphs dictated) given at 50 words a minute with no more than three errors within 15 minutes.	__________	__________

CERTIFICATE OF COMPETENCY AWARDED______________________________
Date Initials

ALL competencies required for Certificate of Competency.

SHORTHAND - LEVEL III

COMPETENCY GOAL

At the conclusion of the presentation of all theory principles, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
S-III-1	Given dictation for 3 minutes at 80 words a minute of unpreviewed new matter material	the student will transcribe the material in double-spaced form	with 95 percent accuracy within 30 minutes.* (This objective must be met at least three times.)
S-III-2	Given 5 short business letters** of 90-100 words dictated at 60 words a minute	the student will transcribe the letters using block style	at a speed of not less than 15 words a minute within 30 minutes. At least 2 of the letters must be mailable.

*Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

**Business letters should be unfamiliar, unpreviewed.

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SHORTHAND - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-III-1	Dictation for Speed Building Shortcuts	S-III-1	Shortcuts may be selected and given to the students. Some teachers give them to students only after they achieve 120 words a minute, while others give shortcuts to all students for words chosen for their usefulness in business writing. If shortcuts are to be of value to the students, they must be learned thoroughly and should be written without hesitation.
	Homework		Read homework material 3 times and write all or part of it 2 times. Students may transcribe on the typewriter from homework notes in double-spaced form; then the student may write shorthand from the transcription in the space between the lines.
			RECOMMENDATION: Through all levels of shorthand, homework should be required and completion of homework should be checked in some manner.
	Reading		Since fast reading of shorthand is essential to develop fast writing skill, students should practice until they can read book plates at 2 times the desired writing rate (80 words for 30-second timings is suggested minimum). Time reading of homework notes in class each day (70 words for 30-second timing is suggested minimum from homework notes.) Give reading goals so that students can compete with their own scores.
			HINT: Deduct 1 point for each error or necessary prompting.
	Plans		Suggestions for building speed from Level II may be used. Also use variations of the basic plan for speed building. The 1-minute plan, which is used by many teachers about 2/3 of the time at Levels I and II, should be used much less at this level.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-III-1	Plans (continued)		One of the most successful skill-building plans for this level is the 3 x 4 plan. Assuming your class is working for 100 words a minute, the procedure is as follows: Preview 3 minutes of a 100 word-a-minute take (about 30 outlines). Dictate for one-half minute at 140 words a minute. Dictate the next one-half minute at 140 words a minute. Now dictate the entire first minute at 120 words a minute. Next, dictate the third-half minute at 140 words a minute. Now, dictate the fourth half minute at 140 words a minute. Next, dictate the entire second minute at 120 words a minute. Continue in this manner for the third minute. Finally, dictate the entire take--3 minutes at 100 words a minute. This take can be read back by several students in rotation. Preview any additional words between segments of dictation. Most teachers' manuals suggest that speed takes for grades should be used every other week or not more than once a week.
	Individual Differences		A speed building plan should begin at 20 words below the ability of a student and should be continued to 40 words above. Because of the wide range of student ability in any shorthand class, speeds chosen for dictation may not fit the above criteria. Consequently provision for individual differences may be made in the following manner: When the dictation is too slow, the student should write each phrase more than once. When dictation is too fast, the student is asked to write fluently until what has been dictated is not remembered; then leave a space and start with the dictator again. Another method to handle dictation that is too fast is to scribble write. (Scribble writing is done by writing each succeeding outline on top of the first one without moving the pen.) The student may also dry pen.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Individual Differences (continued)		Hint: Hold in reserve exceptionally easy takes at each speed to use when student reaches a plateau where it is impossible to move up to a higher speed since a plateau is often psychological. One of the best devices to provide for individual differences is the use of recorded dictation at different levels to be used in a shorthand lab. Individual preview sheets should be printed so that each student will have help with troublesome words. Students should have shorthand dictionaries available to check other shorthand outlines.
S-III-2	Dictation for Transcription Elements	S-III-2	All instruction in shorthand, Level III, involves processes which are geared toward the objective. "The transcription of letters and material into Mailable Copy."
	Brief Forms		Review brief forms by dictating them to students for writing or dry penning. Make a list of brief form derivatives to give to the students for homework practice. Make a list of phrases for practice. Periodic tests may be given to encourage students to keep practicing brief forms and phrases.
	Theory		Continue the review of theory. Although the teacher may not wish to test theory formally at this level, research studies substantiate that greater emphasis should be given to the teaching of theory. Klaseus states, "Correctly written outlines are transcribed correctly 96 percent of the time as compared to incorrectly written outlines which were transcribed correctly only 59 percent of the time.[1] Recommend students purchase a shorthand dictionary and use it to look up words or to check accuracy of outlines.

[1] Richard Klaseus, "An Analysis of Some of the Factors that Contribute to the Difficulty of Transcription Materials in Gregg Shorthand, Diamond Jubilee Series" (Master's, Mankato State College, 1964).

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Vocabulary		The student's vocabulary list and spelling list from Level II should be expanded by adding words from the daily lessons and from letters used for dictation. Short tests should be given periodically. Use shorthand copies where words have been omitted. Students supply missing words when transcribing the copy.
	Punctuation		Review punctuation by brief discussion. As learners read back from homework, punctuation should be verbalized. As students write their homework, punctuation should be indicated in red. At this level, punctuation should not be dictated.
	Styles of Letters		Several letter styles (see Typing, Level II) should be demonstrated, and students should be instructed to use block style. Demonstrate attention and subject lines, carbon copy and enclosure notations.
	Correct Letter Placement Form Shorthand Notes		After dictating a short letter to students, have them check how much notebook space was required for the dictation. Continue wth a medium letter to check notebook space.
	Typing		Continue giving students 5-minute timed writing of straight copy material; then a timed writing of the same material written in shorthand. Encourage students to type from these shorthand notes at 40 - 60 words a minute with no more than 2 errors a minute. Expect 1/2 to 1/3 of the striaght copy rate when transcribing notes from shorthand dictation.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Paragraphing		Do not dictate paragraphs at this level. Give the student information about paragraphing. The first paragraph is usually a short one. The writer tries to gain the interest and attention of the reader to establish the proper state of mind. Reference may be made to previous correspondence on the same subject. The central part of the letter contains explanation or persuasive arguments. This part may be broken into several paragraphs, each dealing with one aspect of the main idea. The closing paragraph, usually very short, may contain a summary or a conclusion based upon the information previously presented. It may attempt to get a favorable response or action from the reader to be a means of bidding the reader a courteous farewell. Emphasize to the students that paragraphs may depend upon the feeling of the writer and that paragraphs in business letters should not be longer than 8 or 10 lines.
	Supplies Arranged in Workable Form		Emphasize to students that secretaries must arrange desks and supplies so that items are located in neat, easy-to-use places. Set tabs on the typewriter for date line and closing lines.
	Proofreading		Teach students to proofread before taking transcripts out of the typewriter. Have them read the copy slowly, word for word. Instruct students to check for spelling and typographical errors first, for grammar and punctuation errors second, and for "sense" errors third. As an added precaution, have students read the lines backward for typing errors in each word. (see Word Processing, Level III, and Typing, Level I).

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Proofreading (Continued)		HINT: Select 2 students each week for a proofreading committee. Grades may be given to the student based on the number of additional errors that the committee finds. This also improves proofreading skills of committee members. Instruct committee members to learn proper proofreader's marks (see Typing, Level II).
	Correcting		Demonstrate the corrective devices on the market: tapes that cover the error, tapes that lift off the ink, liquid paper (explain that this method may damage the typewriter unless it is allowed to dry thoroughly), erasing, and correcting typewriters that either lift off the error or cover the error. Demonstrate reinsertion and alignment of copy when an error is discovered after its removal from the typewriter. HINT: Use either a window envelope or set the typewriter on "stencil cut." Teach the students to correct by crowding and spreading.
	Inside Addresses		Have students type a card file of addresses for the letters dictated for mailability. Also, be sure to have some actual incoming letters on letterhead stationery to give students experience in deciding which information should be chosen by them for the inside address.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reading Cold Notes (Continued)		Require students to date each day's notes and refer to previous day's dictation. Have students type from cold notes. HINT: This would be similar to an office where a stenographer would not be able to finish all the dictation the same day it was dictated.
	Mailability Standards		Mailable copy is a transcribed letter a reasonably exacting employer would normally be willing to sign at any time: (1) It follows very closely the thought of the dictator. Some variations from the context are permitted if they do not change the original meaning of the dictator. (2) It contains no uncorrected errors in spelling, typing, punctuation, or syllabication. (3) It looks reasonably neat. Corrections are done neatly. Margins are fairly even, and the letter is well balanced. (4) It contains no omissions, such as an entire clause or sentence in the body of the letter, the date, the salutation, or complimentary close.
	Dictation Speeds		Dictate letters at 20 words below speed of student. Mailability should demonstrate how many mailable letters student is able to produce from notes written within the control of the writing rate. To account for individual differences, dictation must be given at different rates, and the student must be encouraged to type all letters that are recorded. Use not only letters for dictation for transcription but other types of written communication as well.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation Speeds (Continued) Production		Start transcription of mailable letters for a period of 10 minutes with 2 letters dictated at 60 words a minute. Increase dictation to 4 letters to be transcribed in 20 minutes. Finally use a 30-minute production test with 5 or 6 letters dictated at 60 words a minutes. The 30-minute production test is the most reliable and most valid measurement instrument in shorthand testing.
	Drill		On a transcription speed-practice drill to be used over several weeks, students should: take in shorthand 125 words dictated at 50 words a minute. (All dictation is taken at the back of the notebooks so that it is separate and may be retained for use during these weeks.) transcribe their notes using a 70-space line with single spacing making no error corrections. multiply the number of lines transcribed by 14 (words in line) and divide by time (5 minutes). circle errors as the teacher reads back copy and mark "pass" if they typed at least 25 words a minute (half of dictation rate) with 10 errors or less. repeat procedure the following week with copy of 150 words dictated at 60 words a minute. (All students successful in getting the dictation will transcribe these notes. Others may turn back in their notebooks and transcribe the lower speed given the previous week.)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Drill (Continued)		The teacher should continue to increase the speed and the word count (enough for 2 1/2 minutes) as long as any student passes the copy. If no one passes the copy, dictate a new copy at the same speed the following week.
	Grading		Several methods of grading mailable copies may be used throughout this level. In place of assigning grades to each set of mailable letters, points may be given for each mailable letter which then may be accumulated during the grading period. The grade based on total points may be averaged with grades given to letter tests.
			Another method of grading production letters is to add the number of words transcribed plus 15 words for each inside address and closing signature. A grade may be assigned based on the total words transcribed. Average this grade with a grade given for the number of letters mailable.
			A third method would be to total the words of all the letters transcribed plus 15 words for each inside address and closing signature for 6 transcription periods. Calculate the transcription rate by dividing the total number of words by the total time spent transcribing. Double this rate and add to it 1 point for each mailable letter* and 2 points for each perfect letter**. Assign a grade to this score.

*Words differ slightly, but the meaning is the same.
**Transcription is verbatim.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Grading (Continued)		Grades for production testing should be weighted more than other items. Weight in grading should be in proportion to the total time spent on activities to be graded.
	Envelopes and Copies		Introduce typing of envelopes. The new style of address is: MR SAM JONES 245 SOUTH BLUE PHOENIX AZ 85021 Notice that it is in all caps with no punctuation and no extra spaces (refer to Typing, Level II). Explain the importance of making copies of materials that go out of the office and processes available for making them. If possible, have students observe some of them. Give students carbon paper and have some of the transcription done with carbon copies. Instruct the students how to correct when using carbon paper.
	Introduction to Office Style Dictation Characteristics		Give untimed dictation to ease the transition from the classroom to the business office. Include the following characteristics in the dictation of business letters: 1. Wording is changed after material has been dictated. 2. Portion of dictated material is read back to dictator. 3. Make omissions in dictation such as date and amounts. 4. Errors in dictation are uncorrected by dictator. 5. Technical terms are spelled by the dictator. 6. Some punctuation is dictated. 7. Errors are made in grammar. 8. Portions of dictation are repeated. 9. Rewording is to be done by the secretary. 10. Use various method of delivery such as dictator moving around, interruptions, and giving directions.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Correct Use of the Notebook		Put name and date on cover of notebook. When notebook paper is completely used, the date should be recorded on the front cover. Flag items with paper clips. After dictation, read through notes and put punctuation in with red pen. Write on front side only and then turn notebook over and write on other side. Date each page in the lower left-hand corner. Use a rubber band to keep used pages separate. Leave a space at the beginning and end of each letter for writing directions. Separate each letter with 2 horizontal lines, and draw vertical lines through letters after they are transcribed. Leave second column of the notebook free to note additions and changes in dictation. Demonstrate how to make changes in notes. Place completed letters in a folder so they will not be in view of the public. Type a rough draft of letters dictated when dictator needs an immedicate copy of revisions. When dictation is interrupted, use time to read notes and add punctuation. After dictation is completed, consult reference books as needed such as a manual for secretaries, a words division manual, a dictionary, and a shorthand dictionary. Hint: Encourage students to take these books with them when they apply for a job.
	Timing		Office-style dictation and transcription should not be timed.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Preparation for Employment Pre-employment Tests		The following devices should be used to prepare students for employment tests: (1) instruct students to use different typewriters, (2) grade the amount of material transcribed without specifically telling the student when to start and stop (3) give only 1 sheet of paper to transcribe a letter, (4) test from taped dictation, (5) test using a variety of dictators, (6) start with slow dictation and go to fast dictation, (7) start with fast dictation and go to slow speeds, and (8) use government and company tests.
	Job Opportunities		Contact local employment agencies to check availability of jobs. Use compter programs to secure information about employment opportunities in various fields.
	Case Studies		Using case studies or stories about former students, emphasize the following characteristics for employment: grooming loyalty, flexibility, accuracy, neatness, dependability, initiative, mental alertness, honesty, and punctuality.
	Recommendations		Dictation for speed testing produces the best results if given on Friday after a week of speed building. Tests for reading are best given on Monday, and Wednesday is a good day to test those integrated activities. Students on Level III should keep a secretarial manual containing all handout sheets, the spelling and vocabulary lists, and any other information pertinent to offices.

LEVEL III SHORTHAND CRITERION-REFERENCED MEASUREMENTS

S-III-1 Dictate for 3 minutes at 80 words a minute on unpreviewed new matter. Select material that has a high frequency of the most-used words in business with a syllabic intensity of 1.4 to 1.6. Have students transcribe the speed take within 30 minutes in double-spaced form with a 70-space line and 5-space paragraph indentions. All errors must be corrected. A dictionary may be used to verify spelling. The student should type name, date, and speed dictated at the top of the paper. The student must pass 3 speed tests at 80 words a minute with 95 percent accuracy to meet this objective. Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

S-III-2 Dictate 5 short unfamiliar, unpreviewed business letters of 90-100 words each at 60 words a minute. Have students transcribe the letters using block style. A dictionary may be used to verify the spelling. Give inside addresses and the dictator's name to be used in transcription. The criteria for evaluating the letter are: (1) the thought of the dictator is followed very closely. Minor changes from the dictation are permitted provided they do not change the original thought of the dictator. (2) No uncorrected errors in typing, spelling, punctuation, or syllabication or poorly done erasures will be allowed. (3) Letter looks reasonably neat. Margins should be fairly even. (4) There are no omissions such as an entire clause or sentence in the body of the letter, the date, the salutation, or the complimentary close. Students will transcribe for 30 minutes at not less than 15 words a minute.* At least 2 of the 5 letters must be mailable.

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*To figure words a minute: Add 15 to the word count of each letter to compensate for typing the inside address and the signature. Add the total words transcribed by the student and divide by 30.

COMPETENCY PROFILE

for

SHORTHAND, LEVEL III

Start Date ______________________

Completion Date ______________________

Student Name ______________________

S-III-1 Transcription from dictation given for 3 minutes at 80 words a minute on unpreviewed new matter (95 percent accuracy within 30 minutes). Objective must be met 3 times.

S-III-2 Transcription using block style of 5 short unfamiliar, previewed business letters of 90 - 100 words dictated at 60 words a minute (speed of not less than 15 words a minute within 30 minutes with at least 2 of the letters mailable).

(date/initials)

	QUALIFIED	NOT QUALIFIED
1		
2		
3		

CERTIFICATE OF COMPETENCY AWARDED ______________________________________
Date Initials

SHORTHAND - LEVEL IV

COMPETENCY GOAL

At the conclusion of the presentation of all theory principles, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
S-IV-1	Given dictation for 3 minutes at 100 words a minute of unpreviewed new matter material	the student will transcribe the material in double-spaced form	with 95 percent accuracy within 45 minutes.* (This objective must be met at least 3 times.)
S-IV-2	Given 6 short business letters** of 100-125 words dictated at 80 words a minute	the student will transcribe the letters using block style and corresponding envelopes	at a speed of not less than 20 words a minute within 30 minutes. At least 4 of the letters must be mailable.

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* Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

**Business letters should be unfamiliar, unpreviewed material.

SHORTHAND - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-IV-1	Dictation for Speed Building	S-IV-1	Speed building practice is continued during Level IV but is not emphasized as much as in previous levels. The reasons for continuing speed building practice are: retention of speed, motivation, and development of higher level speeds which produces more accurate notes at slower speeds. Follow the learning activities in Level III. New speed building plans may be added to existing ones used. Progressive plan is particularly useful just before dictation speed takes. After previewing the 3-minute take, the teacher dictates each minute at a faster rate without pausing. If the class is at 80, the first minute would be at 60, the second at 80, and the third at 100. This dictation is seldom read back as its usefulness is for warmup before dictation for speed tests. Reverse plan has no preview. Teacher dictates continuously starting at the highest speed. After the 100-80-60 dictation, a "postview" of the difficult words is put on the board.
	Shortcuts		Give additional shortcuts.
	Homework		Continue requiring and checking homework every day to be sure students are completing it. Use the homework notes in class for reading and/or transcription for 3 or 4 minutes each day. Continue writing shorthand notes from printed copy as part of homework. The use of tapes or records at home or during lab periods should be encouraged and could substitute as part of the homework assignment.

SHORTHAND - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Dictation for Speed Building (Continued) Reading		Continue timing the reading of shorthand homework notes (suggested minimum from homework notes: 80 words in 30 seconds) and the reading of book plates (suggested minimum: 100 words in 30 seconds).
S-IV-2	Dictation for Transcription	S-IV-2	Continue work on brief forms, theory, vocabulary, punctuation, proofreading, reading cold notes, mailability standards, paragraphing and correcting as described in Level III.
	Correct Letter Placement		Add long letters and 2-page letters to the dictation and have students estimate the margins from the shorthand notes. Give the heading used on a second page.
	Typing		Continue to give students a 5-minute timed writing of straight copy material; then a timed writing of the same material written in shorthand. Encourage students to type from this shorthand at 50-70 words a minute with no more than 2 errors a minute. Expect student to type 1/2 to 2/3 of the straight copy rate when typing from shorthand notes from dictation.
	Inside Addresses		Have students add to the card file of addresses begun on Level III. Continue giving them copies of incoming letters on letterhead. Have students secure information for inside addresses from these.
	Production		Continue the 30-minute production of mailable copies. Spend more time on dictation for transcription during this level. Dictate at 80 words a minute. Refer to Level III for grading. Require that envelopes and some carbon copies be prepared for the letters. Allow 10 words for each envelope and 20 words for each carbon copy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Office Style Dictation		Arrange for other persons to come to shorthand class to dictate to students in office style dictation. (See Level III, Office Style Dictation.) Arrange with various administrators and/or school personnel to dictate in their offices to individual members of the class. Have the students transcribe and submit the letters for signature. Continue with teacher dictation of office style dictation. Office style dictation should be used only occasionally after the students understand the process.
	Dictation Simulation		On day 1 dictate 6 letters to be transcribed on day 2. On day 2, before students finish the transcription , interrupt them and dictate several more letters indicationg that one of them is a "rush" job. Continue in this manner throughout the week. As students finish letters, they are to be put on the teacher's desk for signature. If the letters are mailable, the teacher signs them and returns them for folding. If the letters are unmailable, the teacher returns them for correction. These must be resubmitted for signature. Points may be given at the end of the week for the completed letters, or teacher may require all students to transcribe the unfinished dictation on their own time. Use simulations to teach decision making and priority setting for work to be completed.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Preparation for Employment		Continue discussing case studies to emphasize important qualities of successful office workers.
			Have former students or other businesspersons speak to the class.
			Call employment agencies to secure information concerning job opportunities.
			Secure application blanks from businesses.
			If possible, arrange to have the students take the Civil Service Exam or a similar test.
	Letter Composition		Have students record directions in shorthand and ask them to compose a business letter for an employer who will be absent or as an administrative assistant who would be writing letters.

LEVEL IV SHORTHAND CRITERION-REFERENCED MEASUREMENTS

S-IV-1 Dictate for 3 minutes at 100 words a minute on unpreviewed new matter. Select material that has a high frequency of the most-used words in business with a syllabic intensity of 1.4 to 1.6. Have student transcribe the speed take within 45 minutes in double-spaced form with a 70-space line and 5-space paragraph indention. All errors must be corrected. A dictionary may be used to verify spelling. The student should type name, date, and speed of dictation at the top of the paper. The student must pass 3 speed tests at 100 words a minute with 95 percent accuracy to meet this objective. Mechanics such as punctuation, capitalization, spelling (as long as there is no question about the word intended), and placement on the page will not reduce score.

S-IV-2 Dictate 6 short unfamiliar, unpreviewed business letters of 100-125 words each dictated at 80 words a minute. (One letter should indicate that there is to be an enclosure.) Have students transcribe the letters using block style. A dictionary may be used to verify the spelling. Give inside addresses and the dictator's name to be used in transcription. The criteria for evaluating each letter are: (1) The thought of the dictator is followed very closely. Minor changes from the dictation are permitted provided they do not change the original thought of the dictator. (2) No uncorrected errors in typing, spelling, punctuation, or syllabication or poorly done erasures will be allowed. (3) Letter looks reasonable neat. Margins should be fairly even. (4) There are no omissions such as an entire clause or sentence in the body of the letter, the date, salutation or the complimentary close. Supply students with envelope (or facsimilies) which they should type for each letter. Students will transcribe for 30 minutes at not less than 20 words a minute.* Not less than 4 of the 6 letters must be mailable.

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*To figure words a minute: Add 15 to the word count of each letter to compensate for typing the inside address and the signature and 10 to the word count of each letter for the envelope typed. Add the total words transcribed by the student and divide by 30.

COMPETENCY PROFILE
for
SHORTHAND, LEVEL IV

Student Name ____________________

Start Date ____________________

Completion Date ____________________

(date/initials)

			QUALIFIED	NOT QUALIFIED
S-III-1	Transcription from dictation given for 3 minutes at 100 words a minute on unpreviewed new matter (95 percent accuracy within 45 minutes). Objective must be met 3 times.	1		
		2		
		3		
S-IV-2	Transcription using block style of 6 short unfamiliar, unpreviewed short business letters (and corresponding envelopes) of 100-125 words dictated at 80 words a minute (speed of not less than 20 words a minute within 30 minutes with at least 4 of the letters mailable).			

CERTIFICATE OF COMPETENCY AWARDED ____________________
Date Initials

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

SHORTHAND

Completion Date ____________ School ______________________________

Instructor ______________________________

LEVEL II

3-minute speed dictation at

_____ words per minute with

_____% accuracy on __________.
(date)

Transcription of a short

business letter at __________

words per minute with _____%

accuracy on ______________.
(date)

LEVEL III

3-minute speed dictation at

_____ words per minute with

_____% accuracy on __________.
(date)

Transcription of _____ short

business letters at _________

words per minute with _____%

accuracy on ______________.
(date)

LEVEL IV

3-minute speed dictation at

_____ words per minute with

_____% accuracy on __________.
(date)

Transcription of _____ short

business letters and envelopes

at _____ words per minute with

_____% accuracy on ______________.
(date)

TYPING

DESCRIPTION

The foundation of good typing techniques and continuous development of each student's maximum potential is the goal of modern typing instruction. This section identifies competencies for each level of typing as well as instructional activities that assist each student to achieve these competencies. The suggested sequence will help to build a foundation in the techniques of typing leading the student from keyboarding to the employable level. Competency standards in each typing level are measured by criterion-referenced instruments--some of which are included.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona sanctioned co-curricular student organization. Competitive events: Clerk-Typist I, Clerk-Typist II, and Executive Typist.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Introduction to Typing (Keyboarding)	Reinforcement of Basic Typing Skills Learning Additional Typing Skills	Production Typing	Proficiency in Typing

SUGGESTED STRAIGHT-COPY STANDARDS

LEVEL I	LEVEL II	Level III	Level IV
3-Minute Timings With 0 TO 6 Errors	3-Minute Timings With 0 TO 5 Errors	5-Minute Timings with 0 to 5 errors	5-Minute Timings with 0-5 errors
35-up—A	45-up—A	55-up--A	60-up—A
30-34--B	40-44--B	50-54--B	55-59--B
25-29—C	35-39—C	45-49—C	50-54—C
20-24—D	30-34—D	40-44—D	45-49--D

TYPING-LEVEL-I (Keyboarding)

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
T-I-1	Using a technique and work habit check sheet containing 10 items.	the student will have acceptable check marks	in 8 out of the 10 areas of attainment.
T-I-2	Given a 3-minute straight-copy paragraph timing of average difficulty	The student will touch type	with 80 percent accuracy with 25 gwam with not more than 6 errors.
T-I-3	Given a prepared typewritten paragraph containing 10 errors	the student will circle each error	with 80 percent accuracy within 3 minutes.
T-I-4	Given a half-sheet of paper and a problem containing 5 lines	the student will center the problem vertically and horizontally	with 80 percent accuracy within 10 minutes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
T-I-1	Introduction to Typing Keyboard Touch Method Typewriter Operative Parts Care of the Typewriter	T-I-1	Frequently demonstrate good typing techniques to the students. Limit verbalizing. Demonstrate operation of the basic typewriter parts. Observe students typing and recommend and demonstrate improvement in their techniques. Remind the students of the objectives of each lesson. In the first few weeks, how the student types is more important than what the student types. Utilize the entire typing period from warmup to cleanup. Check the habits of work as well as the techniques of typing. Use a technique checklist to evaluate student's typing techniques. Allow students to use self-evaluation on a prepared technique and work habits checklist. The use of video tape equipment for self-evaluation is helpful. Teach the proper care of the typewriter. For handicapped students, special materials are available from textbook publishers. Use instructional recordings to accompany the textbook, freeing the teacher to provide individualized assistance.

TYPING LEVEL-I (Keyboarding)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
T-I-2	Speed and Accuracy Development	T-I-2	Help the students set short-range goals that can be achieved--such as short 10- or 12-second paced timings. Students should have 1-minute timings with emphasis upon either speed or accuracy (not both). Students should have the experience of various manipulation, concentration, speed, accuracy, alphabetic, number, and other drills. Use games, bulletin boards, and other motivational devices. There should be strong emphasis upon mastery of numbers. Remedial drills should be done on an individualized basis.
T-I-3	Proofreading	T-I-3	Check completed papers (but do not "grade" all papers). Obtain articles from newspapers and magazines for extra proofreading practice.
T-I-4	Tabulation Paragraph Indention Centering Vertical Horizontal	T-I-4	Demonstrate correct tabulating and centering techniques while the student imitates the procedures. Use a variety of brief horizontal and vertical centering and tabulation problems.

TYPING - LEVEL I

T-I-3 PARAGRAPH FOR PROOFREADING MEASUREMENT

Directions: Find and circle ten errors.

Business communication often requires compilation of ideas and information in logical and concise arrangments. These arrangement will frequently include data which are both narritive and statistical in nature. the broad term assigned to such compilations and ideas is "business report". Most typists are expected not only ot type what they see from a handwritten or typewriten rough draft, but they are required to preform simple editting through correction of spelling, grammar, punctuation; and mathematical calculations.

Key:

Business communication often requires compilation of ideas and information in logical and concise arrangements. These arrangements will frequently include data which are both narrative and statistical in nature. The broad term assigned to such compilations and ideas is "business report." Most typists are expected not only to type what they see from a handwritten or typewritten rough draft, but they are required to perform simple editing through correction of spelling, grammar, punctuation, and mathematical calculations.

T-I-4 CENTERING MEASUREMENT

Directions: Center the five double-spaced lines vertically and horizontally on a half sheet of paper long side up.

Your Name
Class (Freshman, Sophomore, etc.)
School
School Address (Street address)
Date

TYPING LEVEL I (Keyboarding)

T-I-1 TYPING TECHNIQUE AND WORK HABITS CHECKLIST

(Place a check mark for each area that is acceptable each rating period)

	RATING PERIODS Dates			
	/ 1	/ 2	/ 3	/ 4
1. Correct keystroking				
2. Correct position of hands, wrists, and elbows				
3. Efficient space bar operation				
4. Proper shift key control				
5. Correct carriage return, without hesitation				
6. Steady, uninterrupted typing				
7. Position at the typewriter (Hand span away from frame of typewriter; body centered with "J" key)				
8. Eyes on copy				
9. Correct work habits (Efficient use of time and materials)				
10. Front frame of typewriter even with front edge of desk Desk cleared of unneeded books and other materials				

COMPETENCY PROFILE
FOR
TYPING

LEVEL I

Student Name________________________

Start Date________________________

Completion Date________________________

(Date/Initials)

		QUALIFIED	NOT QUALIFIED
T-I-1	Good Techniques and Work Habits		
T-I-2	3-minute straight-copy paragraph timing, minimum 25 wpm, no more than 6 errors		
T-I-3	Proofreading		
T-I-4	Tabulating		
	Vertical Centering		
	Horizontal Centering		

CERTIFICATE OF COMPETENCY AWARDED________________________
Date Initials

ALL competencies required for Certificate of Competency.

TYPING - LEVEL II

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
T-II-1	Given a 3 minute straight copy paragraph timing of average difficulty	the students will touch type	with 35 gwam with not more than 5 errors.
T-II-2	Given a 25 question objective test covering special parts of a business letter, envelope, and general typing knowledge	the student will answer the questions	with 80 percent accuracy within 20 minutes.
	Given 3 arranged letters containing approximately 100 words each	the students will type the letters	at a rate of 16 wpm with all errors corrected according to mailable standards within 30 minutes.
T-II-3	Given a 3-column arranged table containing 6 items in each column and with a heading	the students will correctly type the table	at a rate of 12 wpm with all errors corrected within 15 minutes.
T-II-4	Given 10 proofreader's marks to match with their meanings	the students will match the marks	with 80 percent accuracy within 5 minutes.
T-II-5	Given a 1-page rough draft manuscript with proofreader's marks and containing a footnote	the students will type the manuscript in correct unbound form	at a rate of 20 wpm with all errors corrected within 20 minutes.
T-II-6	Given a handwritten paragraph of average difficulty	the students will type the paragraph	at a rate of 12 wpm with all errors corrected within 15 minutes.
T-II-7	Given an arranged outline containing approximately 100 words	the students will type the outline in correct form	at the rate of 16 wpm with all errors corrected within 15 minutes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
T-II-1	Reinforcement of Basic Typing Skills: Improving Speed and Accuracy Improving Techniques Improving Proofreading Improving Tabulation	T-II-1	If available, use the videotape recorder to record students typing to analyze techniques. Use the videotape recorder to present and/or review certain lessons. If available, use a controlled reader to build speed. Teach different proofreading methods: Proofread all material before it is removed from the typewriter. Proofread after the material has been removed fromthe typewriter. Proofread in a team by having the typist read the original copy while another person proofs the typed copy.
T-II-2	Learning Additional Typing Skills: Business Letter Parts Date Line Salutation Body Postscript Other Letter Styles Block Modified Block AMS Simplified Other	T-II-2	Prepare and use transparencies to illustrate the various parts of the business letter or use charts available from publishing companies. Discuss various letter styles and letter punctuation. Assist students to estimate the proper position for typing the address on the envelope. Students should compose (at the typewriter) short memorandums and business letters (such as a letter of commendation to an administrator or faculty member).

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Learning Additional Typing Skills: (Continued) Letter Punctuation Open Mixed Letter Placement Carbon Pack Envelopes Size Address Placement Folding Letter for Insertion Memorandums		
T-II-3	Tabulation Tables Columnar Headings Boxes Tables Ruled Tables	T-II-3	Type arranged tables with a heading, subheading, and columnar headings--some should be ruled or boxed. Students should type lists (students' names, favorite songs, etc.) to review composing and tabulation.
T-II-4	Proofreading Proofreader's Marks	T-II-4	Provide opportunities to use proofreader's marks in correcting papers.
T-II-5	Manuscripts Unbound Footnotes	T-II-5	Drill on individual parts of the manuscript by giving short timings.
T-II-6	Copying from Handwritten Material	T-II-6	Students could type handwritten letter and other materials for other teachers or classes including General Business, English, etc.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Learning Additional Typing Skills: (Continued)		
T-II-7	Outlines	T-II-7	Give short problems to increase skill in tabulating outlines.
	Error Correction		Teach the proper place and use of common correction aids--typing eraser, correction tape, correction fluid, etc. Assist students in discerning between correctable and uncorrectable errors as well as mailable and unmailable copy.
	Related Typing Skills: Capitalization Punctuation Number Typing Rules Word Division Rules Spelling Grammar Other		Students should type short sentences and apply correct rules as to capitalization, punctuation, etc. Give a straight-copy paragraph with incorrect word division, no punctuation, and spelling errors to compare typing competency with regular straight-copy timings.
	Conservation of Materials and Energy		Conservation Suggestions: Conservation of paper: Use both sides of paper. Hand in warmups and drills weekly instead of daily. Utilize scrap paper. Turn off typewriters when not in use. Turn off main power switches and lights at end of day. Salvage work by making corrections, rather than retyping entire page or putting red marks on papers.

TYPING CRITERION-REFERENCED TEST

LEVEL II

T-II-2 PRINCIPLES OF TYPING TEST

Directions: Place the correct letter in the space provided to identify the principles of typing with regard to placement, spacing, styles, capitalization, punctuation, abbreviations, parts of a business letter, and word division.

_c_ 1. The number of blank lines left between the complimentary close and typed signature is
(a) 1 line
(b) 2 lines
(c) 3 lines

_c_ 2. The number of lines in a vertical inch is
(a) 4 lines
(b) 8 lines
(c) 6 lines

_b_ 3. A horizontal inch of elite type across the page has
(a) 16 spaces
(b) 12 spaces
(c) 8 spaces

_b_ 4. The official postal abbreviation used with a ZIP code for Arizona is
(a) Ariz.
(b) AZ
(c) Az

_c_ 5. The address on an envelope should be
(a) Centered vertically and horizontally
(b) Typed slightly above and to the right of center
(c) Typed slightly below and to the left of center

_a_ 6. The ZIP Code is placed
(a) One space after the state abbreviation
(b) Two spaces after the state abbreviation
(c) Three spaces after the state abbreviation

T-II-2 PRINCIPLES OF TYPING TEST (Continued)

c 7. The address of an envelope should be typed
(a) in upper and lower case
(b) with double spacing, block style
(c) in all capital letters, no punctuation

c 8. In a full-block style letter, the date is typed
(a) to end at the right margin
(b) below the salutation
(c) beginning at the left margin

b 9. An enclosure notation on a letter is typed
(a) above the date
(b) below the reference initials
(c) above the reference initials

b 10. In mixed (standard) punctuation, the salutation of a letter is followed by
(a) a comma
(b) a colon
(c) no punctuation

c 11. In open punctuation, the salutation of a letter is followed by
(a) a comma
(b) a colon
(c) no punctuation

c 12. In open punctuation, the complimentary close of a letter is followed by
(a) a comma
(b) a colon
(c) no punctuation

b 13. A letter containing 130 words is a
(a) short letter
(b) medium letter
(c) long letter

c 14. In a modified block or semi-block letter style, the complimentary close and signature are typed
(a) at the right margin
(b) at the left margin
(c) at the center

c 15. A letter with all lines beginning at the left margin is in
(a) simplified style
(b) modified-block style
(c) block style

c 16. After typing the main heading of a manuscript or table, you
(a) Single space
(b) Double space
(c) Triple space

a 17. When using a typewriter with elite type, what space line is used for a letter containing 80 words?
(a) 50 space
(b) 60 space
(c) 70 space

c 18. The word that would be correctly divided at the end of a typewritten line is
(a) a-long
(b) might-y
(c) publi-cation

c 19. The word that would be correctly divided at the end of a typewritten line is
(a) bl-ade
(b) dinn-er
(c) nega-tive

b 20. The word that would be correctly divided at the end of a typewritten line is
(a) taki-ng
(b) dis-cover
(c) stra-ight

b 21. After a comma within a sentence, space
(a) 0 times
(b) once
(c) twice

b 22. A period used after an abbreviation is followed by
(a) 0 spaces
(b) one space
(c) two spaces

a 23. In mixed (standard) punctuation, the complimentary close is followed by
(a) a comma
(b) a period
(c) no punctuation

c 24. After a period that ends a sentence, space
(a) 0 times
(b) once
(c) twice

c 25. A colon used to introduce a series is followed by
(a) 0 spaces
(b) one space
(c) two spaces

TYPING CRITERION-REFERENCED TEST

LEVEL II

T-II-4 PROOFREADER'S MARKS TEST

Directions: Match the following proofreader's marks with the correct definition

______	1.	₰	a.	move right
______	2.	^	b.	move left
______	3.	]	c.	move up
______	4.	⁐	d.	move down
______	5.	[	e.	transpose
______	6.	stet	f.	close up
______	7.	∽	g.	paragraph
______	8.	¶	h.	set in lower case
______	9.	≡	i.	let it stand
______	10.	/	j.	capitalize
			k.	delete
			l.	spell out
			m.	insert

Key:

k	1.	₰	a.	move right
m	2.	^	b.	move left
a	3.	]	c.	move up
f	4.	⁐	d.	move down
b	5.	[	e.	transpose
l	6.	stet	f.	close up
e	7.	∽	g.	paragraph
g	8.	¶	h.	set in lower case
j	9.	≡	i.	let it stand
h	10.	/	j.	capitalize
			k.	delete
			l.	spell out
			m.	insert

COMPETENCY PROFILE
FOR
TYPING

LEVEL II

Student Name ______________________________

Start Date ______________________________

Completion Date ______________________________

(Date/Initials)

		QUALIFIED	NOT QUALIFIED
T-II-1	3-minute straight copy paragraph timing, minimum 35 wpm, no more than 5 errors		
T-II-2	Principles of Typing		
	Letters		
T-II-3	Tables		
T-II-4	Proofreader's Marks		
T-II-5	Rough-draft Manuscript		
T-II-6	Handwritten Paragraph		
T-II-7	Outline		

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

ALL competencies required for Certificate of Competency.

TYPING - LEVEL III

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
T-III-1	Given a 5-minute straight copy paragraph of average difficulty	the student will touch type	with 45 gwam with not more than 5 errors.
T-III-2	Given a 2-page rough draft manuscript corrected by proofreader's marks and containing 2 footnotes	the student will type the manuscript in correct leftbound form	at a rate of 25 wpm with all errors corrected within 30 minutes.
T-III-3	Given 3 frequently used business forms (invoice, purchase order, bill of lading, or voucher check)	the student will correctly type	at the rate of 11 wpm with all errors corrected within 30 minutes.
T-III-4	Given a memorandum, 2 short letters, and 2 envelopes	the student will correctly type	at the rate of 20 wpm with all errors corrected.
T-III-5	Given a handwritten letter of average length and difficulty	the student will type the letter	in mailable form at 28 wpm in 10 minutes.
T-III-6	Given a short incoming memorandum that contains 3 major points to be answered	the student will compose and type a short answer in correct memorandum form	with 80 percent accuracy within 10 minutes.
T-III-7	Given 2 short arranged tables of average difficulty with headings and subheadings—one ruled and one boxed	the student will correctly type the tables	at a rate of 15 wpm with all errors corrected within 30 minutes.

TYPING - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Production Typing:		
T-III-1	Speed and Accuracy Development	T-III-1	Give timed writings ranging from 5-7 minutes. Give short exploration timings for speed building. Give short control-level timings to develop accuracy.
T-III-2	Manuscript Leftbound Topbound Side Headings Rough Draft Handwritten Copy Typed Copy Statistical Copy Footnotes Bibliography Title Page	T-III-2	Type various styles of multiple-page manuscripts with footnotes, a bibliography, and a title page from typed and handwritten copy. Correlate with English Department on style they prefer for footnotes, bibliography, etc. Correlate with English Department approximate time students should have the knowledge for typing manuscripts. Encourage students to type all reports for other classes and have typing facilities available for their use.
	Proofreading		As a homework assignment, have students proofread the entire lesson typed that day--warmups, drills, production jobs.
T-III-3	Business Forms Invoice Purchase Order Bill of Lading Voucher Checks Other	T-III-3	Type on various business forms procured from local businesses. Commercially prepared forms may be used also for drill. Secure handwritten practice set business forms completed by other business classes (accounting, office machines, etc.) for students to proofread and type.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Production Typing: (Continued) Letters, Memorandums and Envelopes		
T-III-4	Typed Copy Special Notations Tables	T-III-4	Have letter production timings from typed copy. Some should contain special notations (subject line, attention line, special delivery, etc.) and tables.
			Demonstrate chain feeding of cards and envelopes and other typing shortcuts that increase the efficiency of the typist.
			One volunteer chainfeeding project (envelopes, cards) for the school office, a charitable organization, etc., is advantageous.
T-III-5	Handwritten Copy	T-III-5	Have letter production timings from handwritten copy.
			Simulate an employer's handwritten letters.
T-III-6	Composing	T-III-6	Increase emphasis on composition at the typewriter—short answers to incoming memorandums and letters, etc.
			Compose a memorandum to the student council or the administration relative to some current school problem.
	Application Letter, Application Blank, Resume		Compose a letter of application and a resume. Fill in a sample application blank.
T-III-7	Tabulation and Typing Skills Tables Ruled Boxed	T-III-7	Assist the students in learning how to estimate margin and tabulator settings and not to rely on specific directions to produce an attractive copy. Leaders should be used in some tables.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Metrics:		Type a letter asking for metric information. Have available several sizes of paper including standard metric. Type tabulations converting standard measurements into metric. Content of some timed writings should contain information about metrics. Discuss information about metrics in typing found in more current textbooks.
●	Conservation of Materials and Energy	●	Conservation Suggestion: Conservation of paper: Use both sides of paper. Hand in warmups and drills weekly instead of daily. Utilize scrap paper. Turn off machines when not in use. Turn off main power switches and lights at end of day. Salvage work by making corrections, rather than retyping entire page or putting red marks on papers.

TYPING - LEVEL III

T-III-6 Memorandum Composition Test

DATE: (current date)

TO: The FBLA Program Chairman

FROM: The FBLA Advisor

SUBJECT: Next FBLA Meeting

Please advise me about the results of your last committee meeting regarding the date, time, and place of the next meeting.

COMPETENCY PROFILE
FOR
TYPING

LEVEL III

Student Name____________________________________

Start Date______________________________

Completion Date__________________________

(Date/Initials)

		QUALIFIED	NOT QUALIFIED
T-III-1	5-minute straight-copy paragraph timing, minimum 45 wpm, no more than 5 errors		
T-III-2	Manuscript with Footnotes		
T-III-3	Business Forms		
T-III-4	Memorandums		
	Letters		
	Envelopes		
T-III-5	Letter from Handwriting		
T-III-6	Composing a Memorandum		
T-III-7	Tables		

CERTIFICATE OF COMPETENCY AWARDED____________________________________
Date Initials

ALL competencies required for a Certificate of Competency

TYPING - LEVEL IV

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
T-IV-1	Given a 5-minute straight copy paragraph timing of average difficulty	the student will touch type	with 50 wpm with not more than 5 errors.
T-IV-2	Given 2 medium length unarranged handwritten letters with short tables	the student will type the letters in mailable form	at a rate of 20 wpm with all errors corrected according to mailable standards within 45 minutes.
T-IV-3	Given 2 business letters requiring 1 answer	the student will compose and type a response in letter form	at a rate of 25 wpm with all errors corrected according to mailable standards within 30 minutes.
T-IV-4	Given a 1/2-page leftbound business report with 2 endnotes and with a heading but no other supportive parts	the student will type the business report and endnotes	with all errors corrected within 40 minutes.
T-IV-5	Given a 1-page rough-draft copy containing 20 common errors	the student will mark the copy with correct proofreader's marks	with 80 percent accuracy within 15 minutes.
T-IV-6	Given 5 metric questions as they apply to typing	the student will answer the questions	with 80 percent accuracy within 5 minutes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Proficiency in Typing:		
T-IV-1	Improving Speed and Accuracy	T-IV-I	Continue giving short timings for speed and accuracy.
			Give timings ranging from 5-10 minutes in duration.
T-IV-2	Business Letters Unarranged Rough Draft Including Tables Handwritten	T-IV-2	Type unarranged, rough-draft letters with tables simulating office correspondence.
			Encourage students to learn to "guesstimate" for letter and table placement for greater speed and efficiency.
			Continue giving varieties of handwritten material from which to type (teachers, students, local businesses, etc.)
T-IV-3	Composing Business Correspondence	T-IV-3	Compose answers to letters simulating routine office correspondence.
	Reference Books		Develop worksheets and in-basket materials to encourage the proper use of reference sources--typing style manual, dictionary, secretary handbook, ZIP code directory, and telephone book.
T-IV-4	Business Reports	T-IV-4	Where possible, obtain actual business reports from local businesses, publications, and the school district.
			Most business reports are single spaced and are either in memorandum or left-bound form. The summary will often appear first in a business report. Endnotes are references placed at the end of business reports and are numbered in order of appearance.

TYPING - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Proficiency in Typing: (Continued)		
	Agendas and Minutes		Type club agendas and minutes (such as FBLA/PBL).
	Financial Statements		Type club treasurer's reports, Income and Expense Statements, Balance Sheets, etc.
			Obtain Annual Reports from which to type financial statements.
	Preparing Model Copies for Reproduction Electronic Stencil Cutter Electronic Spirit Master Maker Camera-ready Copy Photo Copy Other		Refer to Reprographic Section for activites.
	Task Priorities		Use in-basket materials with time lines to help students learn to set priorities.
	Business Etiquette and Ethics Courtesy		Use proper language and manners in relating to other in classroom.
	Productive Utilization of Time		Role playing and simulated materials should be utilized.
	Cooperation With Others		Design experiences to encourage a cooperative effort in production.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Proficiency in Typing: (Continued)		
	Specialized Typing Legal Medical Technical Governmental Insurance		Use integrated or in-basket projects to expose students to various types of offices--government, insurance, technical, medical, legal, etc. Many commercially made materials are available. Use the newspaper as a reference from which to type Articles of Incorporation, etc.
	Sample Employment Tests		Use sample employment tests--Civil Service, private industry, temporary services, and other employment tests. Contact local personnel offices to obtain tests; Civil Service tests booklets may be purchases commercially.
	Typewriters with Unique Features Basic Operation		Use machine manufacturer's instruction materials or develop projects to help students learn the operation of typewriters with unique features.
	Introduce Basic Document Cycle Origination Production Reproduction Storage Distribution		Refer to Word/Information Processing Section for activities.

TYPING - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Proficiency in Typing: (Continued)		
	Work Measurement Words Per Minute Line Count		Explain to students that 5 strokes equal 1 word; 10 words equal 1 line. To convert lines typed in 1 minute to words a minute, move the decimal one place to right (4 lines equal 40 wpm). To convert line count to words a minute when the line count represents more than one minute: 20 lines typed for 5 minutes equal 40 wpm (20 ÷ 5 = 4 x 10 = 40)
T-IV-5	Proofreading	T-IV-5	Assist the students in analyzing errors and determining the best method of correction. Students should have practice using proofreader's marks on their own papers, prepared material, etc.
T-IV-6	*Metrics Typing Numbers Typing Paper Size Envelopes	T-IV-6	Type numbers as they are required to be typed using the metric system. Type a letter on metric-size paper and fold for smaller metric-size envelope.

*All numbers may be written as one digit (such as 3), two digits (such as 45), or three digits (such as 678). A number must not exceed a series of three digits. A series of more than three successive digits within a number must be separated by a space. (Previous: 1,234,567 Metric: 1 234 567)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
T-IV-6	*Metrics (Continued)	T-IV-6	Metric paper sizes: Size A4 is 297 mm long and 210 mm wide. In relation to the normal 8 1/2" x 11" page, it is 1/4 inch narrower and about 3/4 inch longer. The additional length will allow two extra lines of typing. *Letter folding: Fold a letter for a DL envelope the same as a No. 10. To fold for a C6 envelope: Fold in half from bottom to top; then fold in half from side to side. Reference: Metric Conversion Act of 1975.
	● Conservation of Materials and Energy		● Conservation Suggestions: Discuss with students the cost factor of producing letters, reports, etc. Business reports are single spaced to conserve paper.

TYPING CRITERION-REFERENCED TEST

TYPING, LEVEL IV

T-IV-6 APPLIED TYPING METRICS TEST

Directions: Place the correct letter in the space provided

1. Metric size typing paper is

______ A. the same length as 8½" x 11" typing paper
__B__ B. longer than 8½" x 11" typing paper
______ C. shorter than 8½" x 11" typing paper

2. Metric size typing paper is

______ A. the same width as 8½" x 11" typing paper
______ B. wider than 8½" x 11" typing paper
__C__ C. narrower than 8½" x 11" typing paper

3. The number 29,876,421 would be correctly written in metric as

______ A. 29, 876 421
______ B. 298, 764, 21
__C__ C. 29 876 421

4. Metric envelope size DL is the same as

__A__ A. The No. 10 envelope
______ B. The No. 6 envelope
______ C. none of the above

5. To fold a letter for size C6 metric envelope

______ A. fold in thirds from bottom to top
__B__ B. fold in half from bottom to top and then fold in half from side to side
______ C. fold the same as for a No. 6 envelope

TYPING CRITERION-REFERENCED TEST
TYPING - LEVEL IV

T-IV-3 Business Letter Composition Test

Pleasantville High School
Pleasantville, AZ 81254
(Current Date)

Mr./Ms. C. F. Jones
124 Happy Lane
Pleasantville, AZ 81234

Dear Mr./Ms. Jones

Current reference material indicates that typists have a choice when it is impossible to determine from information given whether the individual to be addressed is a male or female--for example, C. F. Jones as indicated above.

Please look at the inside address and salutation of both letters and indicate by answering this letter which style you prefer to use.

Sincerely

D. B. Smith

Pleasantville High School
Pleasantville, AZ 81254
(Current Date)

M. C. F. Jones
124 Happy Lane
Pleasantville, AZ 81234

Dear M. Jones

Current reference material indicates that typists have a choice when it is impossible to determine from information given whether the individual to be addressed is a male or female--for example, C. F. Jones as indicated above.

Please look at the inside address and salutation of both letters and indicate by answering this letter which style you prefer to use.

Sincerely

D. B. Smith

Directions: Compose and type one response to these two letters in mailable-letter form.

COMPETENCY PROFILE
FOR
TYPING

LEVEL IV

Student Name________________________ Start Date________________________

Completion Date________________________

		(Date/Initials)	
		QUALIFIED	NOT QUALIFIED
T-IV-1	5-minute straight-copy paragraph timing, minimum 50 wpm, no more than 5 errors		
T-IV-2	Letters with Tables		
T-IV-3	Composing Reply to Letters		
T-IV-4	Business Reports		
T-IV-5	Proofreader's Marks		
T-IV-6	Applied Typing Metrics Test		

CERTIFICATE OF COMPETENCY AWARDED________________________________
Date Initials

ALL competencies required for a Certificate of Competency

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

TYPING

Completion Date ____________ School ______________________________

Instructor ______________________________

LEVEL I

________ Good Techniques and Work Habits

________ 3-Minute Timed Writing
________ Words Per Minute

________ Proofreading

________ Tabulating

________ Vertical Centering

________ Horizontal Centering

LEVEL II

________ 3-Minute Timed Writing
________ Words Per Minute

________ Letters

________ Tables

________ Proofreader's Marks

________ Rough-Draft Manuscripts

________ Paragraphs from Handwriting

________ Outlines

LEVEL III

________ 5-Minute Straight Copy Timed Writing
________ Words Per Minute

________ Manuscripts with Footnotes

________ Business Forms

________ Memorandums

________ Letters and Envelopes

________ Letters from Handwriting

________ Composing Memorandums

________ Special Tables

LEVEL IV

________ 5-Minute Straight Copy Paragraph Timed Writing
________ Words Per Minute

________ Letters with Tables

________ Composing Replies to Letters

________ Business Reports

________ Mastery of Proofreading Techniques

________ Applied Typing Metrics

WORD/INFORMATION PROCESSING DESCRIPTION

Word Processing has created a technological revolution and a reorganization of the structure in the modern office.

The Word/Information Processing program is designed to help the student gain a competency level of skills in word processing as an integral part of most entry-level office jobs as well as some entry-level word processing production jobs. Word processing must not be considered a separate entity but must be considered as one function of the modern office.

These units may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive event: Office Procedures.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
WORD/INFORMATION PROCESSING CONCEPTS	INTRODUCTION AND APPLICATION OF THE BASIC DOCUMENT CYCLE	REINFORCEMENT OF THE BASIC DOCUMENT CYCLE AND THE REFINEMENT OF THE PRODUCTION PHASE	APPLICATION OF BASIC DOCUMENT CYCLE AND THE INTRODUCTION OF WORD/INFORMATION PROCESSING SYSTEMS AND SUPERVISION
Overview Historical Developments Technological Developments Expectations for the Future Basic Document Cycle Origination Production Reproduction Filing/Storage Distribution Career Paths Job Titles/Descriptions Aptitudes and Skills Vocabulary Unique to Word/Information Processing	Review of Concepts Document Characteristics Work Measurement Purpose Language Skills Mechanical Skills Cost Relationships within the Basic Document Cycle Phases Practical Applications—Production and Reproduction Phases of the Basic Document Cycle Vocabulary	Review of Levels I and II Origination Phase Transcriber's Duties Media/Document Chart Work Measurement Quantity, Quality, Costs Logging and Scheduling Production Measurement Practical Application— Production and Reproduction Phases of the Basic Document Cycle Reproduction/Reprographics Micrographics Communications/Distribution Vocabulary	Review of Concepts Review of Basic Document cycle Introduction of Systems Introduction of Supervision Merging Technologies in Word and Data Processing Application of— Origination Production Reprographics Micrographics Distribution Phases of Basic Document Cycle Vocabulary

WORD/INFORMATION PROCESSING - LEVEL I-IV

Teachers must be aware of the new skills, office procedures, equipment, and career paths which word processing is introducing to the business world. Office educators should not let the present thrust of word processing frighten them or make them feel that their total program needs to be completely revised; however, some changes are necessary to help prepare office workers to meet the challenges of today and the future.

Some recommended preparatory and on-going teaching activities that are basic to all W/IP levels are listed below:

W/IP LIBRARY

The teacher's W/IP library development is one activity that should be started early and added to or revised as often as time and money permits. Start small, but start!

Selected lists that may be of help to a teacher new to W/IP are included after Level IV.

A beginning W/IP library could include:
- Textbooks
- Organizations--Trade and Professional (see W/IP page 41)
- Publications spotlighting W/IP and D/IP (see W/IP page 42)
- Vendors, Manufacturers, Suppliers

  Catalog and file lists could include: Automatic typewriters, copiers, dictating equipment, facsimile, filing equipment, furniture, micrographics, reprographics, soft-ware, and text-editing equipment.

- Consulting Services
- Audio/Visual Section (Invaluable)

  W/IP equipment is so varied and expensive that much early education about W/IP will be done through visuals.

    - Vendor publications, brochures, sales materials
    - User's manuals, when available
    - Cassettes to review sections for an absent or new student
    - Slide and filmstrip collections are easily enlarged as interesting materials are found in the community
    - Video tapes of specific/general machine operations, offices, and guest speakers

WORD INFORMATION PROCESSING - LEVEL I-IV

SKILL BUILDING ACTIVITIES

W/IP is a new way to organize existing office skills. The teacher will not find speed and accuracy skill-building techniques for a typist in this section but will be referred to the Typing section. In the learning activities column, teachers are referred to the appropriate Curriculum Guide section. Several Guide sections mentioned for use are: Typing, Records Management/Micrographics, Mailing Process, Communication Arts, Reprographics, Machine Transcription, Job Application, Reference Sources, Energy Conservation.

GROWTH IN READING SKILLS

Reading is one of the basic communication arts skills and is a skill that often needs to be taught and re-taught.

New vocabulary and concepts in W/IP are not commonly learned outside a special unit or course; therefore, classroom texts are not readily available. The teacher has the responsibility of providing ample reading which will introduce terms, concepts, illustrations, and professional adult-level publications.

The teacher should provide learning activities to assist students in developing reading skills. Reading assignment sheets will help the student identify vocabulary and itemize major topics of the article as well as serve as question and answer guides.

Student assignment sheets should increase in difficulty as the student evidences increased ability to read and understand.

The skill of abstracting a professional-level article would be desirable by Level IV. A suggestion for an abstract format is included in Level IV.

WORD/INFORMATION PROCESSING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-I-1	Given a series of 10 slides, pictures, diagrams, and/or examples of office patterns	the student will identify those which are traditional patterns and those which are transitional patterns	at 80 percent accuracy.
W/IP-I-2	Given the task of identifying the basic document cycle	the student will define and arrange in sequential order the 5 phases	at 80 percent accuracy.
W/IP-I-3	Given a list of the aptitudes and skills recommended for W/IP career paths	the student will prepare a personal checklist	as acceptable to the teacher.
W/IP-I-4	Given the task of beginning a glossary of W/IP terms which include a definition and an example of usage where applicable	the student will take an open-book test on 10 terms	at 90 percent accuracy.

WORD/INFORMATION PROCESSING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-I-1	WORD/INFORMATION PROCESSING CONCEPTS Overview of Word Processing Historical Developments Patterns of the Traditional Office Patterns of the Transitional Office WP Center Satellite WP Center Mini-Correspondence Center Automated Work Station Characteristics of the Emerging Office Technological Developments Expectations for the Future	W/IP-I-1	HINT: Suggested time frame for Level I, three to five hours. Show film tracing historical developments. Have speaker from a WP Center introduce factors in the Overview. (Video tape for teacher's library.) Develop bulletin boards to depict the "History of Words." Read supplementary materials. Class discussions on supplementary readings. Demonstrate through overhead transparencies the changing office patterns. Analyze transparencies, slides, filmstrips prepared from the simplified graphs, and charts illustrated in the newer texts and manuals.
W/IP-I-2	Basic Document Cycle in the Traditional and Transitional Offices Origination Production Reproduction Filing/Storage Distribution	W/IP-I-2	Compare and discuss a presentation of the Basic Document Cycle in the following three ways: 1. listing name and definition 2. diagramming with illustrations and pictures. 3. flowcharting using symbols.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-I-3	Career Paths Job Titles and Descriptions Aptitudes and Skills	W/IP-I-3	Have speaker discuss careers that are available to word processing personnel, skills and attitudes that are essential for WP personnel. Introduce students to professional organizations--youth level and adult level. Scan professional magazines, brochures, and office-related materials to become aware of supplementary reading materials available in word/information processing. Prepare a beginning inventory of the existing typing skills, if any, and measure language arts skills. If time permits, this inventory can be expanded to include personal aptitudes and skill. International Word Processing Association (IWPA) Job Title and Description for Word Processing Trainee: Entry level position for those having 0-12 months word processing experience. Must have adequate typing skills, good knowledge of grammar, punctuation, spelling and formatting, the ability to use dictionaries, handbooks and other reference materials, and be oriented toward teamwork and the use of machines. A trainee's functions include routine transcription and manipulation of text from various types of source information (dictation, handwritten, etc.). Maintains own production records, and may be required to proofread own work.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-I-4	Vocabulary Unique to Word/Information Processing	W/IP-I-4	Each student should begin a Glossary of W/IP terms, abbreviations, and acronyms which will be expanded as a student progresses through the W/IP levels. The Glossary should include a minimum of 25 words with definitions and examples of usage where applicable. Some words are unique to WP and others are new usages of old terms. It is recommended that the Glossary should be on file cards for ease in arranging and for use during open-book vocabulary tests. Example:

TERM	DEFINITION	EXAMPLE OF USAGE
Production	Accomplishing the project; in WP, creating the type-written product.	There are two correspondence secretaries who are responsible for the production of the type-written documents.
OCR	Optical Character Recognition	A form of data input employing optical scanning equipment.

WORD/INFORMATION PROCESSING CRITERION-REFERENCED MEASUREMENTS

LEVEL I

W/IP-I-1 Develop the competency test materials for the first goal by carefully selecting 10 items from the materials used in the classroom presentations. The items selected should be simple and clearly representative of the traditional or transitional office. A simple ten-point answer sheet would be appropriate for the student's identification of the slides, etc.

W/IP-I-3 A selected sample of the aptitude and skill items which might be listed for the W/IP Career Paths Checklist are:

Responsibilities	Characteristics
Type fast	Positive attitude
Produce error free copy	Like to type
Spell and punctuate accurately	Analytical ability
Proofread	Machine oriented
Manage time	Ability to understand new equipment/terminology
Set work priorities	Conscientious to detail

Comparable lists are found in most word processing texts and can be closely coordinated to classroom presentations and discussions.

COMPETENCY PROFILE
for
WORD/INFORMATION PROCESSING - LEVEL I

Student Name______________________ Starting Date______________________

Completion Date______________________

WORD/INFORMATION PROCESSING CONCEPTS

		Date Qualified	Initials
W/IP-I-1	Basic Word Processing		
W/IP-I-2	Basic Document Cycle		
W/IP-I-3	Career Paths		
W/IP-I-4	Vocabulary (25)		

CERTIFICATE OF COMPETENCY AWARDED ______________________
Date Initials

WORD/INFORMATION PROCESSING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-II-1	Given the tasks completed in Level I	the student will make the necessary corrections	to bring Level I tasks to 100 percent.
W/IP-II-2	Given a series of 20 slides, pictures, diagrams, examples of the most commonly prepared documents from the Media/Documents Chart	the student will correctly identify them	at 80 percent accuracy.
W/IP-II-3	Given a set of 5 documents typically completed by a word processing operator	the student will check for mailability and figure production words per minute for each document	with 80 percent accuracy.
W/IP-II-4	Given 15 individual aspects of the cost factors from the most current publication of a Dartnell-like letter cost chart	the student will match the 15 items to the 5 phases of the Basic Document Cycle	at 80 percent accuracy.
W/IP-II-5	Given an in-basket exercise consisting of a		
	- half-page memo in rough-draft form and a proofreader's symbol chart	the student will type a corrected memo	in mailable form.
	- half-page handwritten memo which requires the preparation of a carbon copy	the student will type the memo and carbon copy	in mailable form.

WORD/INFORMATION PROCESSING - LEVEL II
COMPETENCY GOALS (Continued)

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-II-5 (Continued)	- average-length letter in rough-draft form with no unusual parts	the student will type copies of the letter in two acceptable styles	in mailable form.
	IF machine transcription units are available:		
	Given an in-basket exercise consisting of a half-page memo and an average-length letter in magnetically pre-recorded form	the student will type copies in two acceptable styles	in mailable form.
W/IP-II-6	Given the task of adding 25 new vocabulary terms to the W/IP glossary	the student will pass an open-book test on 10 words from the new 25 words	at 90 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	INTRODUCTION AND APPLICATIONS OF THE BASIC DOCUMENT CYCLE		
W/IP-II-1	Review Word/Information Processing Concepts (See Level I outline)	W/IP-II-1	If there has been no lapse of time between the completion of Level I and the beginning presentations for Level II, the class may review Level I as a group. As the time interval increases between Levels I and II, the time spent on review will increase proportionately and students will do more individual work on weak areas uncovered in Level I. Student teams could analyze and correct Level I errors in preparation for the measurement. Have class discussion on media/documents recalled or recognized from past experiences. Teacher will write names of documents identified on board/overhead.
W/IP-II-2	Document Characteristics Form Longhand Rough Draft Shorthand Machine Transcription Media/Document Chart	W/IP-II-2	Give each student a copy of the Media/Document Chart at the end of the W/IP section, W/IP page 41. (This step could be done first.) Identify on a transparency items on the Media/Documents Chart selected from the students' recall list of those documents most commonly found in the typical office. The teacher will identify additional documents on the transparency. A student should have a list of the most commonly found documents at the completion of this discussion on the Media/Documents Chart.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-II-2	Document Characteristics (Continued)	W/IP-II-2	In order to provide data for the student to analyze the wide variety of origination speeds, the students can compare one-minute timed writings done in handwriting and on the typewriter. Divide the class into two groups. Both groups will take a one-minute timed writing on the same measured paragraph. Group One will use longhand; Group Two will type and proofread in rough-draft style. Ask the groups to exchange papers. Both groups will type for one minute from the exchanged papers. Teacher writes on board rough production words per minute measurements of: Longhand — high/low/average Typed rough draft — high/low/average Retyped copy — high/low/average Discussion of all document origination characteristics may follow this activity. Select two or more readily available typing reference sources, such as a typing text and a reference manual. Prepare a card that shows the name of the source and the page numbers where examples can be found of interoffice memos, modified and block letter styles, proofreader's symbols, and the preparation of carbon copies. Students may compare variations in styles found in the different sources. This card may be used later for reference.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Document Characteristics (Continued)		Bulletin boards are ideal to display the wide variety of document characteristics.
W/IP-II-3	Work Measurement Purpose Language Skills Mechanical Skills Keyboarding Transcriber Machine Cost	W/IP-II-3	Obtain a beginning timed writing score (speed and accuracy) and a diagnostic language arts score. These scores may come from tests administered in class or from another class. These scores will aid the teacher in assigning skill-building exercises. The student will gain a feeling of the testing procedures sometimes used prior to employment. Suggestions for discussion topics: Why is it necessary to measure work (classroom and on the job)? How is work measured (classroom and on the job)? Demonstrate how work is measured on the overhead by checking sample copy for mailability and figuring production words per minute. Students may complete comparable exercises with pen and paper. Reference should be made to the similarity of proofing and figuring speeds in typing class. There may be some appropriate readings on work measurements and cost in the W/IP Library. (Refer to W/IP pages 2 and 3).

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-II-4	Relationships within the Basic Document Cycle Phases Origination Production Reproduction Storage Distribution	W/IP-II-4	HINT: Refer to related sections in Curriculum Guide for additional activities. (Refer to W/IP page 3). Review the Basic Document Cycle transparencies used in Level I. Chart on the board/overhead relationships within the Basic Document Cycle. Prepare bulletin boards to illustrate relationships. Show transparency of a Dartnell-like letter cost chart. Compare the chart's cost factors to the 5 Basic Document Cycles phases. Students should itemize the individual aspects of each cost factor.
W/IP-II-5	Practical Applications In-Basket Type Exercises Directions, Oral/Written Activities Speed/Accuracy Drills Handwritten Rough-Draft Reference Material Memo Letter Styles Full Modified	W/IP-II-5	Survey class to determine extent to which students have had experiences in in-basket techniques. Use transparencies to introduce techniques of in-basket style classroom activities. Refer to Communication Arts sections on Reading and Listening to reinforce existing skills in following oral and written directions. (Emphasize oral and written directions in the practical application exercises.) Develop speed and accuracy through extensive drills and practice typing from handwritten copy and rough-draft copy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Practical Applications
(Continued)

Correction Techniques
Proofreading
Techniques and Use
of Symbols
Charts
Carbon Copies

HINT: The approximate proportions of the workload completed in a typical word processing center are:

Correspondence--Dictation and Transcription	1/3
Repetitive Form Letters (boiler-plate and letters made up of stored paragraphs	1/4
Long Documents (text preparation, editing and revision, including copy from previously written materials)	1/8
Other Work Types	1/3

Use reference cards prepared in W/IP-II-2, Document Characteristics, to review memo and letter styles. These reference cards may be used for all in-basket activities performed by the students.

Develop speed and accuracy drills on memos and two basic letter styles. (Refer to Typing section.)

Introduce manual correction techniques, such as erasing, paint-out, cover-up, spreading, squeezing, and aligning. Extensive drilling should follow the introduction and review of correction techniques. (Refer to Typing section.)

Introduce through the use of slides/pictures/diagrams/examples the mechanical correction techniques. Practice if equipment is available.

Introduce or review proofreader's symbols and proofreading techniques. (Refer to Typing and Shorthand sections.) Extensive drilling should follow the introduction and review of these techniques.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Practical Applications (Continued)		Introduce or review the preparation of carbon copies. (Refer to Typing section.) Drills should follow this introduction and review. Gradually increase the number and difficulty of the activities in any one in-basket exercise.
	Transcribing Units—Basic Operations		Introduce the basic operations of available transcribing units through teacher demonstrations. Require students to refer to the equipment manuals during initial hands-on practice. Design the in-basket exercises for maximum use of the transcribing units available.
	IF automatic typewriters are available: Automatic Typewriters Basic Operations		Introduce the basic operations of available transcribing units through teacher demonstrations. Require students to refer to the equipment manuals during initial hands-on practice. Design the in-basket exercises for maximum use of the transcribing units available.
W/IP-II-6	Vocabulary	W/IP-II-6	Bulletin board illustrating the new 25 words. Word Games. Each student should continue the Glossary of W/IP terms, abbreviations, and acronyms which were begun in Level I. The Glossary should include a minimum of 25 new words with definitions and examples of usage where applicable. Some words are unique to WP and others are new usages of old terms. It is recommended that the student continue to place the Glossary on file cards.

WORD/INFORMATION PROCESSING CRITERION-REFERENCED TEST

LEVEL II

W/IP-II-2 Develop the competency test materials for the second goal by carefully selecting 20 slides/pictures/diagrams/examples from the materials used in the classroom presentations. The items selected should be simple and clearly representative of the most commonly prepared documents from the Media/Documents Chart. A simple 20-point answer sheet would be appropriate for the student's identification of the slides, etc. The answer sheet must be scored with 18 out of 20 correct answers.

W/IP-II-3 The teacher should reproduce 5 documents representing those typically completed by a word processing operator, such as letters, memos, and reports. Word count and completion time need to be recorded on each document. The student should use proper proofreading symbols to identify any errors found; calculate and record production words per minute. This will provide 10 items for teacher scoring--5 correct identifications of a document's mailability and 5 calculated figures presenting production words per minute.

An answer or score sheet could be used. It would cover:

Document	Mailable or Not Mailable		Production Words Per Minute
1	______	______	______
2	______	______	______
3	______	______	______
4	______	______	______
5	______	______	______
Total	____ / 10 Score/Possible		

W/IP-11-4 The teacher may draw from the itemized lists, prepared by the students in W/IP-II-4, Learning Activities, 15 representative aspects of the cost factors. A matching measurement sheet may be designed with 15 cost items in Column A and the 5 Basic Document Cycle phases in Column B.

COMPETENCY PROFILE
for
WORD/INFORMATION PROCESSING - LEVEL II

Student Name________________________________ Starting Date____________________________

Completion Date____________________________

BASIC DOCUMENT CYCLE INTRODUCTION

		Date Qualified	Initials
W/IP-II-1	Word Processing Concepts		
W/IP-II-2	Media/Documents Chart		
W/IP-II-3	Work Measurement		
W/IP-II-4	Basic Document Cycle		
W/IP-II-5	Production . . . . 4 documents (not timed)		
W/IP-II-6	Vocabulary (25)		

CERTIFICATE OF COMPETENCY AWARDED__________________________________
Date Initials

WORD/INFORMATION PROCESSING - LEVEL III

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-III-1	Given the tasks completed in Level II	the student will make the necessary corrections to bring the Level II tasks	to 100 percent accuracy.
W/IP-III-2	Given the task of collecting samples/examples of 10 items from the Media/Document Chart	the students will correctly match the items to the chart	at 80 percent accuracy.
W/IP-III-3	Given an article reproduced from a W/IP journal/magazine relating to work measurement and its relationship to an individual operator	the student will summarize the major points	as acceptable to the teacher.
W/IP-III-4	Given a 500 word in-basket exercise consisting of: - one handwritten short letter - one rough draft short letter - a magnetically prerecorded half memo and a short one-page report	the student will type mailable copy	at the rate of 10 production words per minute in 50 minutes. (100 words per 10 minutes).
W/IP-III-5	Given a list of 5 problem situations involving choices of copying processes and a list representing processes	the student will select the correct process	at 80 percent accuracy.

COMPETENCY GOAL (Continued)

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-III-6	Given the task of completing a survey in 5 businesses in the community	the student will identify the filing duties and responsibilities of a beginning W/IP operator	at 100 percent completion
W/IP-III-7	Given a series of 10 slides, pictures, diagrams and/or examples illustrating the communication and distribution technology	the student will correctly identify the items	at 80 percent accuracy.
W/IP-III-8	Given the task of adding 25 vocabulary terms to the W/IP Glossary	the student will pass an open-book test on 10 words from the new 25 words	at 90 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	REINFORCEMENT OF THE BASIC DOCUMENT CYCLE AND THE REFINEMENT OF THE PRODUCTION PHASE		
W/IP-III-1	Review of Levels I and II (See Levels I and II outlines) Overview—Levels I and II Relationships within the Basic Document Cycle Career Development	W/IP-III-1	If there has been no lapse of time between the completion of Level II and the beginning presentations for Level III, the class may review Level II as a group. As the time interval increases between Levels II and III, the time spent on review will increase proportionally, and students will do more individual work on weak areas in Level II. Student teams will correct Level II errors in preparation for the measurement. Show film tracing historical developments and emerging technologies. Have speaker from a local word processing center and/or personnel department discuss career development. (Video tape for teacher's library.)
W/IP-III-2	Origination Phase Categories of Dictation/Transcription Units Desk Top Unit Portable Unit Central Dictation Unit	W/IP-III-2	Collect and display various types of company, vendor, and transcribing equipment manuals. Analyze and compare manuals of various manufacturers of dictation/transcription equipment.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Origination Phase (Continued)		
	Responsibilities of the Originator		Analyze and compare company manuals for the duties of the originator and the transcriptionist.
	Responsibilities of the Transcriptionist		If equipment is available, schedule hands-on experiences.
	Effective Use of Manuals Equipment Operation		Survey class to determine the extent of their skills.
	Company Office Reference Preliminary Preparation		Discuss the preliminary preparations of transcribing—"get-ready time."
	Review of Media/Document Chart		HINT: Stress time-efficient practices because production is now becoming a measured factor in the W/IP section.
			Refer to the sections on Communication Arts, Listening and Reference Sources.
			Use drills to stress recognition of proofreading symbols in handwritten copy. (Refer to Typing and Shorthand sections for additional learning activities.)
	Work Measurement Quantity Quality Costs		Identify on a transparency a sample of a "Reading Guide." The parts could include: vocabulary, identifying concepts or ideas, and general questions about the article.
	Logging and Scheduling Production Measurement Line Document		Have students read an article and analyze it together using the overhead. The student will read additional articles and complete reading guides individually.
			Use transparencies to introduce samples of logging and scheduling. Instructor interprets headings; class discussion follows.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Work Measurement (Continued)		Examine samples of completed logs for quality, quantity, and cost factors. Class discussion of the responsibilities of the supervisor for logging and scheduling. Show transparency of the Production Measurement Scale. Illustrate: 5 strokes equal 1 word; 10 words equal 1 line. To convert lines typed in 1 minute to words a minute, move the decimal one place to right (4 lines equal 40 wpm). To convert line count to production words a minute when the line count represents more than one minute: 20 lines typed for 5 minutes equal 40 wpm (20÷5=4x10=40). If company manuals are available, the students may examine them for examples of logging and scheduling techniques.
W/IP-III-4	Document Production Phase-- Review and Practical Application Review Relationship within Basic Document Cycle Review Measurements and Cost	W/IP-III-4	Review Basic Document Cycle and Measurement transparencies previously introduced.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Equipment Automatic Typewriters Stand-alone Text Editors Stand-alone Display Editors Communicating Text Editors Shared-logic Systems Time-shared Services		Demonstrate the unique features of the equipment available in the department Have vendors demonstrate their equipment. Video tape demonstrations for teacher's library. Develop bulletin board displays of Word Processing equipment.
	Pre-Keyboarding Company and Reference Manuals Directions from Supervisor Oral Written		Show transparencies of the unique operational features of various keyboards. Students may compare placement of the special keys. Refer to Communication Arts section for examples of drills on reference manuals. HINT: Develop exercises throughout the units in such ways that they will emphasize oral directions. (Refer to Communication Arts, Listening Skills section). Teacher collect and display a sample kit of appropriate pre-keyboarding supplies, such as types of paper, correction tools, etc. Bulletin board display to show how to arrange supplies at the transcriptionist's desk for effective use.
	Keyboarding, Mechanical Accurate and Rapid Typing Using Machine Controls Straight Copy Statistical Copy		Refer to the Typing section for speed and accuracy drills Use and develop exercises when necessary stressing speed and accuracy in typing straight and statistical copy. (Refer to the "Workload Proportion" in W/IP-II-5.)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Accurate Arrangement of Preveiwed Documents (Illustrated in Company Manuals) Correct Errors Using Various Techniques Operate Automatic Keyboards Machine Coding Mechanical Error Corrections		Provide multiple sources of samples and examples on a bulletin board or on transparencies of company namuals for student reference and comparison. Develop and give quizzes on individual parts of the more commonly used documents, such as memos, letters, and reports. Stress strengthening of individual student's weaknesses. (Refer to Level II.) IF automatic equipment is available: Drill on error-correction techniques. Viedo tape presentations on error correction techniques could be used if equipment is not available. Teacher demonstrations of machine coding appropriate to the level of equipment available or provide a video tape presentation of coding. Drill on coding appropriate to the level of transcription.
	Keyboarding—Language Arts Grammar Spelling Sentence Structure Vocabulary Punctuation Listening		Refer to Communications Arts section. HINT: Students must be aware the English language is vital to the successful operation of word processing equipment. Directions must be understood. Production must be mailable.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Post-Keyboarding Proofreading Content Typos Format Originator's Directions Follow Oral/Written Directions Reprographics Storage Distribution Logging		Refine and reinforce language arts skills by continuing to use the activities in the Communication Arts section. (Refer to all sections of the Communication Arts.) A diagnostic language arts score obtained in W/IP-II-3 will enable the teacher to select the most appropriate exercises for the student. Introduce team proofreading as the technique used in word processing centers. Two or more operators work cooperatively to verify the accuracy of the document with one reading the original and one checking the finished document. The team looks for content, typos, format, etc. Have students proofread and appropriately mark their own work. Proofread teacher-prepared exercises.
	Practical Applications of the Production and Reproduction Phases		Hint: At this level the student will learn the basics of machine operation and develop a production rate on a selected sampling of letters, memos, and short reports. The measurement goal is 10 production words per minute. Design your drill materials so that the number of words and the time allotted can be easily figured. Students practice in-basket activities using all the document types in the measurement. Complete exercises in which students receive their directions in oral and written form.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Practical Applications (Continued)		Complete activities that require setting of priorities. Build speed and accuracy through activities which include error correcting, proofreading, language arts usages, etc. Accurately arrange previewed documents. If automatic typewriters are available, have students complete some practical applications. These types of exercises should be developed and used so that the students will be comfortable with this type of exercise techniques before completing the competency task.
W/IP-III-5	Reproduction/Reprographics Traditional Copy Systems Alternatives Emerging Office Copy Systems Alternatives Ink-Jet Printer Laser Computer-Assisted Printer	W/IP-III-5	Refer to Reprographics section. Compile through class discussion steps taken during the decision-making process, such as gathering and analyzing factors, considering all reasonable choices, making and justifying choices. Using these factors, teams can develop some case problems which compare various copy systems for cost, speed, quality, quantity, new technology, etc. Collect and compare samples of actual documents.
W/IP-III-6	Micrographic and Automated Filing Records Processing Procedures Organization and Maintenance Systems Equipment	W/IP-III-6	Refer to Micrographics/Records Management section. Role-play telephone interviews. Class discussion on duties and responsibilities of personnel in the records management department.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Micrographic and Automated Filing (Continued)		Analyze actual job descriptions pertaining to records management personnel HINT: Local and state governments readily provide job descriptions with which to start building your library. Analyze a survey instrument which may be found in the back of a word processing text. Develop as a class a survey instrument which will identify the filing duties and responsibilities of a beginning word processing operator.
W/IP-III-7	Communication/Distribution Company and Private Mail Systems U.S. Postal Service Emerging Technologies of Electronic Mail Satellite Communications Telecommunications Communicating Text Editor TWX/Telex Facsimile Mailgram	W/IP-III-7	HINT: Do not spend too much time on this unit as it is a "glamour" phase of word processing. Class discussions, bulletin boards, and films to illustrate the unique technology developing in this phase. Speakers and field trips to places such as the local phone company, Western Union and local utility corporations provide a realistic look at some of the sophisticated technology in current use. (These could be video taped for the teacher's library.) Refer to Mail Processing section. Obtain literature and brochures, prepare transparencies that illustrate communications/distribution technology.

WORD/INFORMATION PROCESSING - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-III-8	Vocabulary	W/IP-III-8	Bulletin board illustrating the new 25 words. Word games. Each student should continue the Glossary of W/IP terms, abbreviations, and acronyms from Level II (W/IP-II-6). The Glossary should include a minimum of 25 words with definitions and examples of usage where applicable. Some words are unique to WP and others are new usages of old terms. It is recommended that the student continue to place the Glossary on file cards.
●	Conservation of Energy and Materials	●	Paper conservation is easily illustrated by the use of CRT equipment and electronic sending devices. Communicating typewriters save the energy used in creating, mailing, delivering and responding to correspondence. Both people and word processing equipment are affected by heat, humidity, air circulation and foreign particles in the air. Text-editing equipment generates heat during operation and will malfunction if it gets too hot or does not have enough air circulation. These elements need to be planned and controlled in the office.

WORD/INFORMATION PROCESSING - LEVEL III

Criterion-Referenced Measurement

W/IP-III-5 The teacher will need to draw on the W/IP library for texts and other sources describing the reproduction phase of the Basic Document Cycle for some problem situations and a list representing processes. Care needs to be taken in the selection and development of situation descriptions to prevent the addition of factors that confuse the reader and could lead to an incorrect choice.

Example of a Problem Situation:

Give students a list of reproduction methods that might include:

Carbon
Spirit
Photocopy
Laser
Others

A COE student is employed in the local elementary school office. One of her duties is to type a document and run a given number of copies. Which method of reproduction would be the most efficient?

W/IP-III-6 The filing duties and responsibilities of a local beginning W/IP operator will have been identified by the student during a study of job descriptions. A survey instrument may be developed by the instructor from a collection of local job descriptions. An instrument format can be developed that is easily used for a phone survey.

Example of some questions for a survey instrument:
- Filing systems used:
  - Traditional? Explain:
  - Micrographics? Explain:

Explain how the company is converting to micrographics.
- Microform reader used?

Microforms used: Roll Film___Aperature cards___Microfilm Jackets___Microfiche___

Is there a records retention schedule? Describe.

W/IP-III-7 Develop the competency test materials for the Goal 7 by carefully selecting 10 slides, pictures, diagrams, and/or examples from the materials used in the classroom presentations. The items selected should be simple and clearly representative of the technology of the communication/distribution phase. A simple ten-point answer sheet would be appropriate for the student's identification of the slides, etc.

COMPETENCY PROFILE
for
WORD/INFORMATION PROCESSING - LEVEL III

Student Name________________________________ Starting Date________________________________

Completion Date________________________________

BASIC DOCUMENT CYCLE
Production Words Per Minute - 10

		Date Qualified	Initials
W/IP-III-1	Word Processing Concepts		
W/IP-III-2	Origination Phase		
W/IP-III-3	Work Measurement		
W/IP-III-4	Production Minimum Rate: 10 PWPM		
	Student Rate: ______		
W/IP-III-5	Reprographics		
W/IP-III-6	Micrographics		
W/IP-III-7	Communications/Distribution		
W/IP-III-8	Vocabulary (25)		

CERTIFICATE OF COMPETENCY AWARDED________________________________
Date Initials

WORD/INFORMATION PROCESSING - LEVEL IV

COMPETENCY GOAL

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standards.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-IV-1	Given the tasks completed in Level III	the student will make the necessary corrections	to bring the Level III tasks to 100 percent
W/IP-IV-2	Given access to word processing journals and magazines	the student will abstract two articles for each of the 5 phases of the basic document cycle	as acceptable to the teacher.
W/IP-IV-3	Given the task of visiting two companies with word processing systems and preparing profiles of the two	the student will complete a comparison chart of the two companies	as acceptable to the teacher.
W/IP-IV-4	Given access to word processing journals and magazines containing subject matter on supervision and supervisory careers	the student will abstract two articles	as acceptable to the teacher.
W/IP-IV-5	Given a series of 10 slides/pictures/diagrams/examples illustrating merging technologies in word and data processing	the student will correctly identify them	at 80 percent accuracy.
W/IP-IV-6	Given the Media/Document Chart	the student will correctly identify items representing "boiler plate" documents and collect samples and or examples	at 80 percent accuracy.

WORD/INFORMATION PROCESSING - LEVEL IV

COMPETENCY GOAL

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
W/IP-IV-7	Given a 750 word In-basket exercise consisting of: - one handwritten short letter - one rough-draft short letter - a magnetically pre-recorded one-half page memo and one page short report	the student will type mailable copy.	at a rate of 15 production words per minute in 50 minutes
W/IP-IV-8	Given a rough-draft copy of the Media/Documents Chart	the student will keyboard, correct all errors, store, and playout on an automatic typewriter	3 reproduction copies in the following forms: one as a Xerox original, one on a spirit master, one on a carbon set.
W/IP-IV-9	Given in microfiche form an article or manual on the topic of filing and records management	the student will select the appropriate viewing equipment and prepare a brief outline of the article	as acceptable to the teacher.
W/IP-IV-1	Given the task of completing a checklist survey of 5 businesses in the community to determine the extent to which they use any of the communication/distribution procedures	the student will identify the survey items on the checklist	at 80 percent accuracy.
W/IP-IV-11	Given the task of adding 25 vocabulary terms to the W/IP Glossary	the student will pass an open-book test on 10 words from the new 25 words	at 90 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	APPLICATION OF BASIC DOCUMENT CYCLE AND THE INTRODUCTION OF WORD/INFORMATION PROCESSING SYSTEMS AND SUPERVISION		
W/IP-IV-1	Review of Concepts	W/IP-IV-1	See Level I. If there has been no lapse of time between the completion of Level III and the beginning presentations for Level IV, the class may review Level III as a group. As the time interval increases between Levels III and IV, the time spent on review will increase proportionally, and students will do more individual work on weak areas uncovered in Level III. Student teams will correct their Level III errors in preparation for the measurement.
W/IP-IV-2	Review of Basic Document Cycle	W/IP-IV-2	See Level II. Review the transparencies of the Dartnell-like letter cost chart and the 5 Basic Document Cycle phases. Analyze the parts of an article abstract prepared by the teacher and look for: A. Reference/Source--author, title, publishers, name of source, data, page, etc. B. Major points and the best way to present information--paragraph or paragraphs, lists, enumerated items, outline etc. C. On-the-job style identifications--by:, For:, Date:.

WORD/INFORMATION PROCESSING - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-IV-3	Introduction of Systems	W/IP-IV-3	Discussion of word processing systems.
			Analyze a questionnaire to be used in the field survey.
			Role play an interview comparable to the field survey.
			Complete a simple questionnaire in 2 different Business Education classes. Example:
			Survey 2 typing classes for: 1. Student's knowledge of 3 selected word processing terms. 2. Speed and error rates of students. 3. If there is a typewriter in the home? If so, the make? 4. Identification of home typewriter uses. Compare the information from the 2 classes.
W/IP-IV-4	Introduction of Supervision	W/IP-IV-4	Solve case problems related to word processing supervisor's duties and responsibilities.
			A speaker from a local word processing center can discuss duties and jobs.
			Panel of supervisors and/or operators discuss their word processing centers' operations.
			Role play personnel problems and personal problems of word processing employees.
			Video tape wherever possible for teacher's library.
			Review abstract form practiced in W/IP-IV-2.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-IV-5	Merging Technologies in Word and Data Processing	W/IP-IV-5	If equipment is available, introduce a Skripsit learning activity on a mini-computer. Refer to D/IP-II-7 for an activity which provides an example of merging technologies as a mini-computer takes on the functions of a word processor. Discuss and illustrate by transparencies and pictures: 1. A paperless office 2. Electronic mail 3. Satellite and telecommunications 4. Computer time-sharing systems
W/IP-IV-6	Application of Origination Phase of Cycle	W/IP-IV-6	Review transparencies of Media/Documents Chart. Obtain and analyze or prepare samples and examples of items not previously studied on the Media/Documents Chart but used in word processing centers. Discuss terms related to the Media/Documents Chart, such as "boiler plate." Prepare bulletin boards and displays of Media/Documents Chart items not previously used.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-IV-7	Application of Production Phase of Cycle	W/IP-IV-7	Refer to W/IP Level III and Typing section. Repeat activities similar to those in W/IP-III-3. Assign speed and accuracy exercises designed to increase the student's production to 15 production words per minute or more. Provide exercises for typing from copy and transcription from recorded media. HINT: Center developed measurement scales take into consideration the necessity to develop a range for a rating field, such as:

Excellent	153 lines or more per hour
Superior	135 to 152 lines per hour
Satisfactory	116 to 134 lines per hour
Marginal	97 to 115 lines per hour
Unsatisfactory	96 or less lines per hour

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-IV-8	Application of Reprographics Phase of Cycle	W/IP-IV-8	Review copy processes introduced in W/IP-III-5. Introduce automated equipment for repography through bulletin board or film. If no equipment is available within the district: 1. Vendor demonstrations of automated equipment 2. Vendor loan of equipment to school for a few days 3. Teacher or several students may demonstrate on loaned equipment 4. Field trip
W/IP-IV-9	Application of Micrographics Phase of Cycle	W/IP-IV-9	Refer to Filing/Records Management section. Survey the kinds, numbers, and availability for class use of microform readers in the school, the district, and the community. Collect and display materials related to micrographics. Indicate costs and suitability for a small office. HINT: Material on microfiche is easily obtained. The school library may have something suitable on file. An item on microfiche ordered through the Arizona Education Information Service (AEIS), at Arizona State University, or the Research Coordinating Unit (RCU), at the Arizona Department of Education, will meet the requirements for measurement. The Arizona Curriculum Guide is on file; the Reprographics section may be requested.

WORD/INFORMATION PROCESSING - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
W/IP-IV-10	Application of Distribution Phase of Cycle	W/IP-IV-10	Review technology presented in W/IP-III-7 and word processing texts. Examine several general checklists found in word processing texts. Analyze a checklist designed to determine the presence of communication/distribution procedures. Role play an interview.
W/IP-IV-11	Vocabulary	W/IP-IV-11	Bulletin board illustrating the new 25 words. Word games. Each student should continue the Glossary of W/IP terms, abbreviations, and acronyms from Level III (W/IP-III-8). The Glossary should include a minimum of 25 new words with definitions and examples of usage where applicable. Some words are unique to WP and others are new usages of old terms. It is recommended that the student continue to place the Glossary on file cards.

W/IP-IV-5 Develop the competency test materials for this goal by carefully selecting 10 items from the materials used in the classroom presentations. The items selected should be simple and clearly representative of the merging technologies in word and data processing. A simple 10-point answer sheet would be appropriate for the student's identification of the slides, etc.

W/IP-IV-9 Refer to W/IP page 38 for suggestions on how to obtain items in microfiche form.

W/IP-IV-10 The communication/distribution procedures will have been identified by the student before the measuring task. A survey instrument may be developed by the instructor from the checklist used to introduce communication/distribution procedures to the class. An instrument format can be developed that is easily used for a person-to-person interview.

Example of some questions for a survey instrument:

Telecommunication systems used: KTS ___ PBX ___ PABX ___ WATS ___ FX ___ Centrex ___

Electronic mail systems used: Facsimile _________ Mailgrams _________

Communicating WP equipment _________ Teletypewriters: TWX ___ Telex ___

TRADE AND PROFESSIONAL ORGANIZATIONS

A variety of services and resource materials concerning word processing may be obtained from the following trade and professional organizations. The teacher should write directly to the organization to inquire about its services and publications.

Administrative Management Society
World Headquarters
Willow Grove, Pennsylvania 19090

American Vocational Association
1510 H Street, N.W.
Washington, D.C. 20005

The Institute for Graphic Communication
375 Commonwealth Avenue
Boston, Massachusetts 02115

International Word Processing Association
Maryland Road
Willow Grove, Pennsylvania 19090

National Business Education Association
1806 Association Drive
Reston, Virginia 22091

The National Secretaries Association
2440 Pershing Road
Crown Center, Suite G-10
Kansas City, Missouri 64108

The Arizona Word Processing Specialists
Treasurer, No. 103
48000 North 68 Street
Scottsdale, Arizona 85251

Word Processing Society
P.O. Box 90920
Milwaukee, Wisconsin 53202

PUBLICATIONS THAT OFTEN HIGH-LIGHT WORD PROCESSING

A variety of publications that often feature articles concerning word processing are listed below. The teacher should write directly to the publisher to inquire about its publication.

BUSINESS GRAPHICS
Graphic Arts Publishing Co.
7373 North Lincoln Avenue
Chicago, Illinois 60646

THE DARTNELL OFFICE ADMINISTRATION SERVICE
Dartnell Corporation
4660 North Ravenswood Avenue
Chicago, Illinois 60640

INFORMATION AND RECORDS MANAGEMENT
Information and Records Management, Inc.
250 Fulton Avenue
Hempstead, New York 11550

INFOSYSTEMS
Hitchcock Publications
Wheaton, Illinois 60187

LAW OFFICE ECONOMICS AND MANAGEMENT
Callaghan and Company
28 State Street, Suite 2200
Boston, Massachusetts 02109

MANAGEMENT WORLD
Administrative Management Society
Maryland Road
Willow Grove, Pennsylvania 19090

MODERN OFFICE PROCEDURES
Industrial Publishing Company
614 Superior Avenue, West
Cleveland, Ohio 44113

THE OFFICE
Office Publications, Inc.
1200 Summer Street
Stamford, Connecticut 06904

OFFICE EQUIPMENT AND METHODS
Maclean-Hunter Publications
481 University Avenue
Toronto 101, Ontario
Canada

OFFICE PRODUCTS
Hitchcock Publications
Wheaton, Illinois 60187

REPRODUCTIONS REVIEW AND METHODS
North American Publishing Company
314 North 13th Street
Philadelphia, Pennsylvania 19107

THE SECRETARY
The National Secretaries Association
2440 Pershing Road
Kansas City, Missouri 64103

MEDIA/DOCUMENTS OF COMMUNICATION

Abstracts
Accounting Code Lists
Advertisements
Administrative Orders
Agenda
Agreements
Announcements
Annual Reports
Applications

Beneficiary Lists
Bill Enclosures
Billings
Booklets
Briefs
Brochures
Bulletins
Business Articles
Business/Financial News

Catalogs
Certificates
Charts
Circulars
Citations
Collection Notices
Commemorative Literature
Complaints
Contracts
Coupons
Credit Forms
Customer Lists

Data Sheets
Deeds
Direct Mail Advertising
Directories
Distribution Lists

Dividend Notices
Drafts

Educational Literature
Employee Lists/Reports
Employee Publications
Engineering Specifications

File Lists
Financial Analyses
Financial Forms
Financial Reports
Form Letters

Goodwill Literature
Graphs
Guides

Handbills
Handbooks
House Organs

Index Cards
Indices
Inquiries
Instructions
Introductions
Invitations
Inventory Lists

Job Descriptions

Labels and Tags
Laws and Bylaws
Leaflets
Legal Briefs
Legal Documents
Letters

Library Indices

Mailing Lists
Manuals
Market Surveys
Material Specifications
Membership Lists
Memorandums
Messages
Minutes

Newsletters

Order and Order Forms

Package Copies
Parts Lists
Patent Lists
Pension Plans
Personnel Lists
Phone Lists
Policies
Policy Booklets/Manuals
Policy Statements
Postal Cards
Posters
Press Releases
Price Lists
Procedures
Product Lists
Profiles
Programs
Project Reports
Projections
Promotional Materials
Proposals
Prospectuses
Purchasing Specifications

Questionnaires

Radio/Television
Commercials
Rate Books
Reading Rack Literature
Recruitment Literature
Reference Lists
Repetitive Correspondence
Reports
Requisitions
Research Studies
Resolutions
Resumes

Sales Presentations
Shipping Schedules
Signs
Software Reports
Solicitation Lists
Specifications
Speeches
Stock Lists
Stockholder Lists
Suggestions
Systems Abstracts

Tariffs
Technical Manuals/Reports
Technical Papers
Telegrams
Test Reports
Timetables
Training Aids

Wills
Working Plans
ETC.

COMPETENCY PROFILE
for
WORD/INFORMATION PROCESSING - LEVEL IV

Student Name____________________ Starting Date____________________

Completion Date____________________

SYSTEMS AND SUPERVISION Production Words Per Minute - 15		Date Qualified	Initials
W/IP-IV-1	Word Processing Concepts		
W/IP-IV-2	Basic Document Cycle		
W/IP-IV-3	Word Processing Systems		
W/IP-IV-4	Word Processing Supervision		
W/IP-IV-5	Merging Technologies		
W/IP-IV-6	Origination Phase		
W/IP-IV-7	Production Minimum Rate: 15 PWPM Student Rate: _____		
W/IP-IV-8	Reprographics Phase		
W/IP-IV-9	Micrographics Phase		
W/IP-IV-10	Distribution Phase		
W/IP-IV-11	Vocabulary (25).		

CERTIFICATE OF COMPETENCY AWARDED____________________
Date Initials

CERTIFICATE OF COMPETENCY

This is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

WORD/INFORMATION PROCESSING

Completion Date ____________ School ______________________________

Instructor ______________________________

LEVEL I - WORD/INFORMATION PROCESSING CONCEPTS

________ Basic Word Processing

________ Basic Document Cycle

________ Career Paths

________ Vocabulary--25 terms

LEVEL III -- BASIC DOCUMENT CYCLE

________ Word Processing Concepts

________ Origination Phase

________ Work Measurement

________ Production
Production Words Per Minute--10
Student's Rate ____________

________ Reprographics

________ Micrographics

________ Communications/Distribution

________ Vocabulary--25 terms

LEVEL II -- BASIC DOCUMENT CYCLE INTRODUCTION

________ Word Processing Concepts

________ Media/Documents Chart

________ Work Measurement

________ Basic Document Cycle

________ Production
4 documents--not timed

________ Vocabulary--25 terms

LEVEL IV - SYSTEMS AND SUPERVISION

________ Word Processing Concepts

________ Basic Document Cycle

________ Word Processing Systems

________ Word Processing Supervision

________ Merging Technologies

________ Origination Phase

________ Production
Production Words Per Minute--15
Student's Rate ____________

________ Reprographics Phase

________ Micrographics Phase

________ Communications/Distribution

________ Vocabulary--25 terms